SERVICE LEVEL AGREEMENT

ADMINISTRATIVE COORDINATION TEAM

Contents

General Information

Purpose

The purpose of this Service Level Agreement (SLA) is to establish a cooperative partnership between the Administrative Coordination Team (ACT) and its customers. This SLA will:

- Outline services to be offered and working assumptions between ACT and its customers;
- Quantify service level expectations;
- Outline the potential methods used to measure the quality of service provided;
- Define mutual requirements and expectations for critical processes and overall performance;
- Strengthen communication between ACT and its customers

Vision

UC Merced's Administrative Coordination Team will provide a shared business environment for the Chancellor's Office, Division of Planning & Budget, and the Division of Business & Administrative Services, as well as all future customers. This business environment will provide the highest level of customer service to the campus by performing work efficiently and effectively, while constantly implementing best practices and continuous improvement. The primary goals for ACT include:

- Integrate people, processes, and technology to provide a balanced service level to all customers. Create a collaborative environment where trusted relationships and teamwork are encouraged between administration, central departments, and suppliers to further UC Merced's core objectives.
- Leverage human resources and institutional knowledge while developing skill sets and technology in an effort to continuously improve service and productivity. Create an organizational structure that balances strategic and tactical efforts that promote efficiencies.
- Mitigate risk by focusing on compliance requirement and understanding the impact these requirements have on productivity and customer service. Develop an integrated organizational structure that will promote the consistent interpretation and enforcement of policies, procedures, laws and regulations.

Mission

The Mission of ACT is to provide our customers with quality, timely and efficient services. We will achieve this mission by utilizing technology, cultivating the skills of our staff and building strong relationships with our customers. We operate our center knowing that we live in a competitive environment and our goal is to ensure our customer's satisfaction.

Scope

ACT's financial team will provided services to the Chancellor's Office, Division of Planning & Budget, and Division of Business & Administrative Services. ACT's payroll team will provide services to the Chancellor's Office, Division of Planning & Budget, Division of Business & Administrative Services and Campus Auxiliaries. ACT's benefit team will provide services to the entire UC Merced campus. All teams can easily be scaled to accommodate customer growth.

Governance

ACT will be governed by dual committees to ensure timely responses to immediate needs and thorough campus review of the more critical issues.

The **Governing Body** is currently made up of senior leaders from each division supported by ACT unless a representative is identified to take their place. This committee will be responsible for personnel changes, budget inquiries and SLA adjustments. Committee meetings will be established on an as needed basis.

The **Steering Committee** will be established when additional departments come on line and it will consist of staff members appointed by their senior leadership. This committee will review metrics, SLAs and team challenges, making recommendations to the Governing Body as needed. Committee meetings will be held quarterly, although metrics will be available on the ACT website on a monthly basis for review.

Hours of Operations

Daily hours of operation are 8:30am to 4:30pm Monday-Friday, with the exception of approved holidays for the university. Working hours may be adjusted due to system/power outages, emergency situations, or disaster.

Quality Control

Reports

ACT will maintain reports on processing times and SLA success rate on the ACT website. These reports will include data from the previous month as well as a 6 month summary of processing times. *Our goal is a 95% success rate in meeting our SLA deadlines*.

Customer Surveys

Customer surveys will be processed twice annually. The target group for these surveys will be the staff that have used ServiceNow to submit a request in the previous 6 months.

The survey will have 3 areas of focus:

ServiceNow Portal
Timeliness
Customer Service

In addition to the 6 month survey, we will be adding a link to the ACT website for additional comments.

Survey results will be posted on the ACT website.

Steering Committee Review

The Steering Committee will meet quarterly to review processing times, SLA success rates and customer feedback. From these meetings, we will establish a priority list of specific topics that have the most opportunity for improvement within ACT.

Service Expectations and Target Processing Times

Disclaimer: *Processing times are directed towards ACTs efforts only and do not include time waiting for approvals, waiting for additional information from customers/vendors, central offices processing times, and UCLA processing times.*

Financial Service Request

Access Request – To request access to buildings and campus systems (Financial Systems, PAN notices, UCMNetID, generic emails, etc).

Customer's Responsibility: Request through ServiceNow; provide business justifications and any other necessary information; ensure approval. Some access requires the customer to complete specific training or background checks.

ACT's Responsibility: Prepare and submit documents.

Target Processing Time: 2 business days to request access.

Notes: Building access is handled by the Campus Locksmith, but MSO/Business Officer approval is required for them to proceed so requests are routed through ACT.

Next Steps in the Process: For building access, customer will need to pick up CatCard/keys and pay any necessary fees. Campus system access will be granted by central office responsible for system. Building access will be granted by the Campus Locksmith.

Account Summary Reports – Monthly reports generated and issued for each account. Reports include projections for spending through fiscal year end.

Customer's Responsibility: Review reports, contact ACT with any concerns about approved budget, projections or expenses.

ACT's Responsibility: Prepare reports with updated projections and distribute by 2nd Friday of the following month. Work with department to resolve any inquiries.

Target Processing Time: By end of business on the 2nd Friday of the month.

Notes: Fiscal close delays the ability to produce accurate reports timely. The distribution of June & July account summary reports will be delayed based on the fiscal close calendar issued by Accounting Services.

Next Steps in the Process:

All Other Financial Requests – To request help that doesn't fall into one of the specified requested items categories. This could include help ordering or moving phones, general inquiries, etc.

Customer's Responsibility: Varies per request.

ACT's Responsibility: Varies per request.

Target Processing Time: Varies per request.

Notes: If request is outside of the scope of ACT responsibilities, we will refer our customers to the appropriate office for handling.

Next Steps in the Process:

Expense Transfers (Non-PEARs) – To correct non-payroll entries on the ledger by moving expenses or updating the account information. Corrections could include changing accounts and/or sub numbers, or updating the project and source codes.

Customer's Responsibility: Request through ServiceNow; identify expense, old fund source and new fund source; and provide justification for move. Requests received after 120 days on the ledger will require additional justification before processing.
ACT's Responsibility: Confirm information; process on-line through UCLA.
Target Processing Time: 5 business days to process.
Notes: The need for the majority of expense transfers are identified by ACT personnel during regular review of the ledgers or by department heads during the reconciliation process. Expense transfers cannot cross fiscal years.
Next Steps in the Process: If accounts associated with the transfer are grant funds, an additional step to get Research Assistant's approval will be taken prior to processing. Once processed, the transaction will be reviewed by Research Accounting Services (RAS) and the ledger will be updated the following business day unless rejected.

General Purchasing – To submit a request for low-value orders, non-travel reimbursements, blanket releases and pro card purchases. Also includes preparing and submitting requisitions to Procurement Services for processing (all services, equipment above $5K, restricted items, agreement renewal and request for international vendors).

Customer's Responsibility: Request through ServiceNow, provide quote or thorough description of goods/services, vendor information, account information (FAU or nickname), need-by date, business justification and approval(s). If it's an unauthorized purchase, complete documents timely.
ACT's Responsibility: Prepare in CatBuy and submit to vendor or Procurement Services for processing. If ticket is a request for a requisition to be sent to Procurement Services, ACT will monitor until a purchase order is received and the vendor has been contacted.
Target Processing Time: 2 business days to place order with vendor or submit requisition to Procurement Services for processing.
Notes: ServiceNow tickets are closed once the order has been accepted by the vendor and our customer is notified.
Next Steps in the Process: If request requires Procurement Service to process, ACT will generate a requisition and send it to Procurement Services for them to create a purchase order and place order with vendor. ACT will monitor request until order has been placed with vendor.

Invoice Processing – To get vendor invoices paid by UCLA.

Customer's Responsibility: Attach invoice to ServiceNow request, reference PO, acknowledge that goods/services have been received and correctly billed. Provide additional approval if necessary. If the invoice does not have a PO associated with it, additional information may be required.
ACT's Responsibility: Compare invoice to CatBuy for accuracy, make necessary adjustments and send to UCLA for payment.
Target Processing Time: 5 Business Days to send invoice to UCLA.
Notes:
Next Steps in the Process: Copies of the invoice will be sent to UCLA where they will review and initiate payment. ServiceNow ticket will be closed when copy of invoice is sent to UCLA.

New Vendor Set-Up – To add a new vendor to the UC procurement system.

Customer's Responsibility: Submit request through ServiceNow General Purchasing ticket, provide contact information (phone, email, website, names, etc.).

ACT's Responsibility: Guide new vendor on how to submit required information to Procurement Services through secured channels. Initiate CatBuy new vendor set-up.

Target Processing Time: 2 business days to initiate request in CatBuy and provide information to vendor.

Notes:

Next Steps in the Process: Procurement Services will verify vendor information and set them up in CatBuy.

Pro Card Receipts – To get pro-card receipt transactions processed in the CatBuy system

Customer's Responsibility: Attach receipt to ServiceNow ticket, provide description of goods or services, business purpose, approvals and work order number if applicable.

ACT's Responsibility: Monitor CatBuy for expense to hit, create PO in CatBuy.

Target Processing Time: 5 business days to create PO in CatBuy.

Notes: Receipts not submitted timely can hit the default FAU and result in suspension or cancellation of the card by Procurement Services. After initial purchase it could take 1-5 business days for the expense to hit in CatBuy. Original receipts should be kept for reference or support during audits.

Next Steps in the Process: Documents are held for monthly reconciliation of the requestor's pro card. ACT will prepare, obtain signatures and submit monthly reconciliation to UCLA by the end of the month. Customer is responsible for signing monthly reconciliation prior to being submitted to UCLA.

Pro Forma Update – To request an updated version of the pro forma for your department.

Customer's Responsibility: Submit a request in ServiceNow, provide new projections/assumptions

ACT's Responsibility: Update pro forma with current expenses and new projections/assumptions

Target Processing Time: 5 business days to distribute updated reports.

Notes:

Next Steps in the Process:

Recharge Processing – To process a recharge unit's billing to other departments for services provided.

Customer's Responsibility: Make request in ServiceNow, include all backup documentation (request, description of services, approvals, rates, etc.). Requests should be complete and accurate when submitted.

ACT's Responsibility: Enter into Financial Systems. In some cases, email backup will be sent to the mandatory PAN reviewers by ACT.

Target Processing Time: 10 business days to enter into Financial Systems.

Notes: Errors may need to be corrected by non-PEAR or journal entry.

Next Steps in the Process: None; transactions will be viewable on the ledger the following business day.

Reconciliations – Create, distribute and collect monthly reconciliation reports.

Customer's Responsibility: Identify designated reviewer. Review reports, notify ACT of any discrepancies, sign and return to ACT by the end of the month. Your signature does not mean that every expense is accurate; signing off on reconciliation reports shows that you have reviewed the expenses and notified ACT of any adjustments that should be made.

ACT's Responsibility: Prepare and distribute reports. Collect signed reports and make adjustments to accounts as noted by designated reviewer. Upload signed reports to ServiceNow.

Target Processing Time: Reports will be distributed by the end of business on the 3rd Wednesday of the month.

Notes: This report is a review of non-payroll expenditures as required by policy. Budget concerns that arise from reviewing these reports will be handled separately.

Next Steps in the Process: A report of outstanding reconciliations is submitted to Business & Financial Services for follow-up with department heads.

Travel Reimbursement – To reconcile and process reimbursement for approved UC Merced travel and entertainment expenses.

Customer's Responsibility: Open ServiceNow ticket, submit description of all expenses and applicable receipts, provide justification for expenses, approvals, agenda, etc. Provide guest list for entertainment related expenses. Provide approved exceptions to policy as required. Keep *all* original receipts for potential audits.

ACT's Responsibility: Review for accuracy and completeness of request, enter information into Express, follow-up with UCLA until payment is scheduled.

Target Processing Time: 2 business days to enter into Express.

Notes: This process may issue a payment directly to your T&E card for any expenses incurred there. If traveler is trained on Express, they are encouraged to enter their own ticket directly into this system and bypass ACT.

Next Steps in the Process: Once processed by ACT, request will go into a queue at UCLA for an auditor to review and approve payment.

Travel Reservations – To request assistance making hotel, airfare and car rental arrangements prior to your trip.

Customer's Responsibility: Open ServiceNow ticket, provide approvals, agenda, justification and travel preferences. Ensure profile and arrangers are up to date in CONNEXXUS.

ACT's Responsibility: Set arrangements in CONNEXXUS or with UCLA travel.

Target Processing Time: 2 business days to complete an itinerary and create necessary purchase orders to pay for travel.

Notes: Complicated travel arrangements or revisions may require the traveler to interact directly with the travel agent to finalize the itinerary. If traveler is trained on CONNEXXUS, they are encouraged to enter their own information directly and bypass ACT.

Next Steps in the Process: None.

Personnel and Payroll Requests

Accrual Reports – To request individual report on an employee's vacation, sick and comp time accrual status. Requests can be made by an employee for themselves or by a supervisor to review an employee's balances.

Customer's Responsibility: Make request through ServiceNow.

ACT's Responsibility: Verify report is updated and distribute.

Target Processing Time: 2 business days to distribute updated report.

Notes:

Next Steps in the Process:

Accrued Time Adjustment – To make a request to review an employee's accrual totals.

Customer's Responsibility: Open ServiceNow ticket; provide employee name and reason for inquiry.

ACT's Responsibility: Review accrual report with employee, process any necessary updates through employee data base.

Target Processing Time: 5 business days to resolve any disputes.

Notes:

Next Steps in the Process:

All Other Personnel/Payroll Requests - To request help that doesn't fall into specific requested items categories. This could include help in submitting paper timesheets, updating TRS supervisors, student employee updates, etc.

Customer's Responsibility: Open ticket in ServiceNow, give complete details of request.
ACT's Responsibility: Varies based on request.
Target Processing Time: Varies based on request.
Notes:
Next Steps in the Process:

Appointment Extension – To extend the end date of a limited term, contract employee and students.

Customer's Responsibility: Submit ServiceNow ticket, include justification and approvals. For students, a Student Change Form is required.
ACT's Responsibility: ACT Business Officers/Liaisons review student change form or prepare PAF and get HR approval for extension of employees, if applicable. ACT Payroll will process in Payroll System.
Target Processing Time: 10 business days to process.
Notes: Contact your Business Officer for assistance.
Next Steps in the Process:

At Your Service Password Reset – To reset your password for the At Your Service website.

Customer's Responsibility: Submit request via ServiceNow.
ACT's Responsibility: Reset password via AYSO and send password reset email to requestor.
Target Processing Time: 1 business day to send reset email.
Notes: Customers are encouraged to use the reset request button on the AYSO page for immediate response.
Next Steps in the Process:

Employee Recruitment – To request assistance in the recruiting process for career and limited staff. Recruiting includes, but is not limited to, the tasks outlined below.

Customer's Responsibility: Open ServiceNow ticket, provide all necessary information including job description, respond timely for additional information, choose hiring committee, and prepare interview questions. Hiring manager: Performs reference checks or coordinate with HR Recruiter; submits all interview questions/notes/rating sheets to Business Officer with details to draft offer letter; notifies all other interviewed candidates and completes disposition of the applicant pool in PAWS.
ACT's Responsibility: ACT Business Officers/Liaisons will assist hiring manager edit and upload job description, submit all required documents to HR, assist with coordination of interviews if requested, prepare draft offer letter for HR approval.
Target Processing Time: Varies by request.
Notes: No offer should be extended until HR has approved. Any job description that has not been reviewed by HR Classification within the last 2 years must be submitted and approved prior to recruitment. Hiring student employees should be submitted under Student Employee Hiring Process.
Next Steps in the Process: Onboarding Process.

Equity, Reclassifications & Stipends – To request assistance with the processes of getting an equity, reclassification or stipend request submitted to HR.

Customer's Responsibility: Open ServiceNow ticket, identify employee, provide job description(s), provide justification and obtain approval. Complete exception forms as required.
ACT's Responsibility: ACT Business Officers/Liaisons will explain process, prepare appropriate documents, and submit via e-Docs. Follow-up with HR as needed. ACT Payroll will process PAF and update payroll file.
Target Processing Time: 5 business days to submit request via e-Docs.
Notes: The total processing time for these types of requests will be 1-4 months before results are received. Some reclassifications will result in a new timesheet on TRS that will be automatically created when PAF is processed.
Next Steps in the Process:

Fund Change & Salary Transfers – To change the funding source for an employee whether it's for future or past pay periods.

Customer's Responsibility: Open ServiceNow ticket, provide employee's name, pay period dates to be changed, accounts involved, amount/percentage to be moved, justification and approval.

ACT's Responsibility: ACT Business Officers/Liaisons will prepare appropriate paperwork. ACT Payroll will process paperwork in Payroll System.

Target Processing Time: 10 business days to process paperwork in Payroll System.

Notes: This will occasionally result in a new timesheet on TRS. Salary transfers are not allowed for previous fiscal years. If a transfer of funds is also required, please submit request through All Other Financial Requests ticket.

Next Steps in the Process:

Involuntary Separations – To terminate an employee for poor performance or disciplinary reasons.

Customer's Responsibility: Open ServiceNow ticket a minimum of 3 business days prior to the separation date. Have supervisor provide updated timesheet information through separation date. Provide justification and HR approval for termination.

ACT's Responsibility: ACT Business Officers/Liaisons prepare paperwork and assist with off-boarding employee. ACT Payroll will process paperwork and request final paycheck from UCLA.

Target Processing Time: By employee's separation date.

Notes: Providing the final paycheck at the time of separation is required by law and the minimum processing time to receive a check from UCLA is 3 business days.

Next Steps in the Process: UCLA will FedEx check to campus.

Onboarding – To request onboarding, which consists of welcome emails, access to systems and buildings, equipment, etc.

Customer's Responsibility: Verify start date; provide hiring documents, if applicable; identify equipment, access needs and work space.

ACT's Responsibility: ACT Business Officers/Liaisons will prepare PAF and follow pre-set checklist for new employees, which includes: sending welcome emails: order necessary equipment; set up phone lines; get temp parking pass; start process to get systems access; order live scan; provide info on how to obtain a CatCard; etc. ACT Payroll will process PAF; set up supervisors in TRS for timesheets; and meet with employee on first day to finalize hiring procedure, including benefits overview, accruals information, I-9 finalizing, and providing info on orientation, live scan and how to obtain a CatCard.

Target Processing Time: By employee's start date.

Notes: CatCard will be available to pick up on the 3rd business day. Most onboarding tickets are automatically issued at the conclusion of the recruitment process, but if our customer does not use us for the recruitment process, they will need to submit a ticket.

Next Steps in the Process:

Org Charts – To request a current, updated or proposed staff organization chart for your department.

Customer's Responsibility: Submit ServiceNow ticket if a chart is required sooner than the next quarterly issuance. Advise ACT of staff updates and chart preferences.

ACT's Responsibility: Update and distribute to customer.

Target Processing Time: Quarterly or within 5 business days for special requests.

Notes: ACT maintains two copies of each org chart, one with working titles and one with payroll titles. The one with payroll titles is required by HR during the recruitment process. Customers are responsible for updating their department websites.

Next Steps in the Process: Some org chart changes may require additional transactions to update payroll, TRS, Halogen and/or align department's budgets and FTE count.

Student Employee Hiring Process – To request assistance in the student worker recruitment process.

Customer's Responsibility: Submit ServiceNow ticket and include job description, justification, account, pay rate and approval. Advise ACT when position has been filled. Complete waivers as required.
ACT's Responsibility: ACT Business Officers/Liaisons will work with customer and Center for Career & Professional Advancement (CCPA) to complete appropriate documents.
Target Processing Time: 5 business days to submit documents to CCPA.
Notes: Ticket will be closed when position(s) have been filled.
Next Steps in the Process:

Voluntary Separation – To request assistance in the voluntary separation of an employee.

Customer's Responsibility: Submit ServiceNow ticket a minimum of 3 business days prior to the separation date. Have employee complete timesheet through separation date, sign Unemployment Insurance Termination (UIT) form and submit resignation letter. Supervisor submits acceptance of resignation; approves PAF and UIT. Supervisor is responsible for collecting equipment, cards, keys, etc.
ACT's Responsibility: ACT Business Officers/Liaisons will help prepare paperwork and assist with off-boarding employee. Payroll will separate employee in the employee database and request final paycheck.
Target Processing Time: By employee's separation date.
Notes: This excludes student workers and faculty. Most final paychecks will be received via direct deposit.
Next Steps in the Process: UCLA will process final paycheck.

Benefits

Benefits Consultation – To obtain specific information regarding benefits

Customer's Responsibility: Submit ServiceNow ticket with all necessary information
ACT's Responsibility: Review and resolve questions/inquiries
Target Processing Time: Varies by request
Notes:
Next Steps in the Process: Contact benefits plans to conduct research and resolve issue

Benefits Eligibility – To inform an employee of eligibility to elect benefits.

Customer's Responsibility: Submit ServiceNow ticket with information about qualifying event.
ACT's Responsibility: Review information and notify employee via email of eligibility. Provide employee with information to complete enrollment via AYSO (if applicable) or via UPAY 850.
Target Processing Time: 2 business days to notify employee of eligibility.
Notes: We receive PANs from Payroll with BELI code information for new hires and employment status changes which effect BELI code. We also receive monthly reports which make employees eligible for benefits. Therefore, not all of the requests are received via ServiceNow tickets. Employees have a 31 day period of initial eligibility (PIE) to enroll in benefits from the date of the qualifying event.
Next Steps in the Process: Conduct benefits enrollment audit via AYSO to determine if employee enrolled via AYSO during PIE and if so close ticket. If UPAY 850 is submitted then proceed to the benefits enrollment change ticket.

Benefits Enrollment Change – To enroll, make changes, or de-enroll benefits when employee and/or dependents gain eligibility.

Customer's Responsibility: Submit ServiceNow ticket. Follow the link on the request page to the UPAY 850 form, complete the form and upload it to the ticket along with proof or qualifying event (e.g. marriage certificate, birth certificate, etc.) to warrant the 31 day PIE.

ACT's Responsibility: Review UPAY 850 and consult with employee - make changes to form if necessary. Sign and date form and submit to APPO/ACT for entry in PPS. Notify employee that UPAY 850 has been sent for processing. If there is a need to access care immediately, call vendor to enroll manually and notify employee once completed. Upload UPAY 850 to box folder.

Target Processing Time: 5 business days to submit UPAY 850 for processing.

Notes:

Next Steps in the Process: Audit on 1st or 15th of the month to determine if APPO/ACT processed enrollments in Payroll System.

Duplicate Coverage – To ensure that employees and dependents are not enrolled in duplicate UC sponsored coverage.

Customer's Responsibility: Review email with duplicate coverage and make decision with other family member. Complete UPAY 850 and submit to Benefits.

ACT's Responsibility: Request duplicate coverage report from Payroll. Review duplicate coverage report and notify employee about duplicate coverage include UPAY 850 to make decision and de-enroll as necessary.

Target Processing Time: Varies by request.

Notes: Requests are generated internally after reviewing duplicate coverage report.

Next Steps in the Process: Once employee(s) submit UPAY 850, proceed to benefits enrollment change process.

Employment Development Department (EDD) – Internal to ACT. Provide information on current/past employee work status to support EDD's decision making process on unemployment, disability and wage garnishment claims.

Customer's Responsibility: Occasionally, ACT will require additional information from an employee's past supervisor/E&LR.

ACT's Responsibility: Send unemployment claims to UC Path Center (UCPC). If requested research and provide additional information/documents to UCPC regarding the unemployment claim. Complete the disability and paid family leave documents received from EDD and mail back to EDD.

Target Processing Time: 5 business days to mail completed forms back to EDD.

Notes:

Next Steps in the Process:

Family Member Eligibility Verification – To verify the eligibility of each person covered under an employee's benefit plan by reviewing de-enrollment report.

Customer's Responsibility: Respond timely to information request.

ACT's Responsibility: Review de-enrollment report received from UCOP. Immediately notify employee of de-enrollment with email warning of de-enrollment if verification is not complete timely. Wait one week for a response and check the third party vendor (TPA) to determine if employee has completed verification – if not send reminder email. If verification is not completed, then notify employee and complete UPAY 850 to de-enroll dependent from benefits. Update the de-enrollment report and return to UCOP.

Target Processing Time: Before monthly deadline.

Notes:

Next Steps in the Process:

Intercampus Transfer & Service Credit – To guarantee that employees beginning their careers at UC Merced have had all prior service credit from state agency properly credited to their account. To provide service credit verification documents to UC Merced employees leaving to another state agency/UC. To ensure that employees transferring from UC Merced to other UC or from other UC to UC Merced have benefits, prior service, and leave balances transferred seamlessly.

Customer's Responsibility: Employee completes verification of previous employment form and submits to prior UC or state agency to verify service and sick leave balance - prior UC or state agency return form directly to UC Merced. Employee's leaving UCM submit the form to Benefits to be completed by Benefits. Collaborate with Intercampus Transfer Coordinator for completion of documents.

ACT's Responsibility: For prior state agency – review verification of previous employment form, complete the Prior Service Credit Certification and submit to APPO/ACT for entry in the Payroll System. For intercampus transfer to other UC - complete UFIN and submit PPS screenshots to intercampus transfer coordinator at other UC. For intercampus to UCM – receive UFIN and PPS screenshots, review and complete UPAY 850 and Prior Service Credit Certification, submit to APPO/ACT for entry in the Payroll System.

Target Processing Time: 2 business days to submit completed form for processing.

Notes: Intercampus transfer tickets are generated internally if we are notified by employee or Payroll. Occasionally an employee can submit a ticket if they feel their service credit is not accurately accounted for.

Next Steps in the Process:

Leave of Absence – To request a leave of absence (LOA).

Customer's Responsibility: Submit ServiceNow ticket with information regarding leave, obtain appropriate documents (doctor and/or supervisor), and submit to Leaves. File disability claim with Liberty Mutual if applicable to leave. Submit timesheets while on leave. If on leave without pay form UC, review benefits premium bill and make payment to Campus Cashiering. Submit return to work certification and notify Leaves once returned to work.

ACT's Responsibility: Gather information to determine LOA type. Review and determine eligibility for leave. Complete notice and send LOA packet. Review returned LOA packet for completeness. Approve and designate leave. Complete UC statement and submit to Liberty Mutual. Create LOA Notice and submit to APPO/ACT for entry to Payroll System. Create bill and send to employee for benefits premium billing. Review payments receipts from Campus Cashiering and apply payments and clear suspense (if necessary). Obtain return to work certification and notify Supervisor that employee is returning.

Target Processing Time: Varies by request.

Notes:

Next Steps in the Process: If employee has limitations/restriction upon return, then send information to Accommodations to review and process.

Premium Billing – To bill academics that are on a leave of absence without pay for the amount due to cover their benefits premium. To bill employees not properly changed for benefits premiums.

Customer's Responsibility: Review bill and pay benefits premiums to Campus Cashiering.

ACT's Responsibility: Send benefit premium notice and apply premium.

Target Processing Time: Varies by request.

Notes: Requests are generated internally after notification is received from Academic Personnel Office or after reviewing benefits deductions from earning statements.

Next Steps in the Process:

Out of Scope

Writing business justifications
Writing job descriptions
Writing scope of work/contracts
Requesting funding or FTEs
Employee benefits decisions