SERVICE LEVEL AGREEMENT

CENTER FOR BUSNESS SERVICES AND SOLUTIONS

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General
Information

Purpose

The purpose of this Service Level Agreement (SLA) is to establish a cooperative partnership between the Center for Business Services and Solutions (CBS2) and its customers. This SLA will:

- Outline services to be offered and working assumptions between CBS2 and itscustomers;
- Quantify service levelexpectations;
- Outline the potential methods used to measure the quality of serviceprovided;
- Define mutual requirements and expectations for critical processes and overallperformance;
- Strengthen communication between CBS2 and itscustomers

Vision

UC Merced's Center for Business Services and Solutions (CBS2) will provide a shared <mark>business environment</mark> for the University of California, Merced. Focusing on administrative functions in the area of Procurement, Travel, Human Resources, and Finance. This department will provide the highest level of customer service to the campus by performing work efficiently and effectively, while continuously focusingimprovements strategies that save financial resources for campus and produce efficient and reliable business practices. The primary goals for CBS2 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 organizationalstructurethatbalancesstrategicandtacticaleffortsthatpromoteefficiencies.
- 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 andregulations.

Mission

The Center for Business Services and Solutions has committed itself to forming key partnerships across campus that allow colleagues to be innovative in their approach to administrative functions while strategically planning for the university's future. CBS2 primary goal 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

CBS2's teams will provide services to various departments on campus

Governance

CBS2has a multi-tiered approach to governance in order to allow frequent feedback on an operational level to support frequent and continuous improvement as well as higher level oversight from campus leadership to ensure the strategic direction of CBS2 is on track and aligned with larger campus

The **CBS2 Governance Board**is currently made up of senior leadership members from various divisions across campus, whom are supported by CBS2. The CBS2 Governance Board consists of Joint Council membership to ensure campus wide leadership oversight for CBS2 service levels, activities and strategic direction. The Board will provide feedback or raise concerns with ongoing services for the Executive Director of CBS2 to address, they will review business cases presented by the Executive Director for any proposed substantial changes and make recommendations to the Chancellor for any items requiring Chancellor level review.

The **Input and Advisory Working Group**consist of staff members appointed by their senior leadership. Each department will provide 1 representative who would be appointed by the division head on an annual basis. The group meets on a quarterly basis to provide feedback and input on how services are working for their divisions and areas that need to be further addressed by CBS2 or the department.

Hours of Operation

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

Quality Control

Reports

CBS2 will maintain reports on processing times and Service Level Agreement (SLA) success rate on the CBS2 website. These reports will include data from the previous month as well as a 6-month summary of processing times. _Ourgoal is a 90% success rate in meeting our SLA deadlines_.

Customer Surveys

Customer surveys will be conducted annually. The target group for these surveys will be the staff that have used ServiceNow to submit a request in the previous 12 months, as well as the leadership served by the Center for Business Services and Solutions.

The survey will have three areas of focus:
- ServiceNow Portal
- Timeliness
- Customer Service

In addition to the 12-month survey, there is an active link on the CBS2 website for immediatefeedback.

Survey results will be posted on the CBS2 website.

Service Description, Expectations and Target Processing Times

Disclaimer: Processing times are directed towards CBS2's efforts only and do not include time waiting for approvals, waiting for additional information from customers/vendors, and central office processing times.

Purchasing Services		
Service Description	Description	Processing Times
Purchase Order Requisitions	Preparation and Submission of requisitions to Procurement Services per the department's request (all services, purchases above $10K, PO corrections, restricted items, agreement renewal and request for international vendors). Software purchases can only be completed via the supplier : JourneyEd at this time all other software purchases must be made with the Office of information Technology) . Monthly Review and Closeout of Open Purchase Orders,	2 Business Days
Invoice Management	Initiate the general purchasing process via requisition input in BobCat Buy on behalf of the department, submit departmental invoices for submission to Accounts Payable for Payment. Mange Invoices with Errors from Accounts Payable and ensure completion through the system.	5 Business Days
Mobile Device Purchases (Cell Phone/MiFi)	Initiate the general purchasing of centralized cell phones and MiFi for the UC Merced campus. This includes change in current services and the purchasing of accessories and is available for all faculty and staff.	Varies
Software Purchases	Initiation of the purchasing of software purchases, available via the supplier : JourneyEd (at this time all other software purchases must be made with the Office of information Technology)	Varies
Vendor Set up	Work with Vendor to establish and update UC Merced Supplier record in Campus Systems	2 Business Days
Procurement Card (PCard) Receipt Process	Process UC Merced PCard Receipts for Campus faculty, staff, and students on authorized purchases made outside of the General Purchasing process. Includes monthly reconciliation of the purchasing card to the deportment on a monthly basis.	5 Business Days
Fed Ex Shipping Label Creation	Create Fed Ex Labels on behalf of the department	Varies
Various Ad-hoc Reports	Initiates the ordering or moving of landline phones, ordering new or replacement cell phones and cell phone plans, and general inquiries, etc.	Varies
Travel Services		
Travel & Entertainment Reimbursement	Process UC Merced Reimbursements for Campus faculty, staff, and students. Includes both Travel & Entertainment Reimbursement	2 Business Days

Travel Reservations	Book department related travel request includes; airfare, car rental, and making hotel arrangements. (Please note hotel reservations may require traveler to update Travel & Entertainment or personal credit card in their CONNEXXUS system profile.)	2 Business Days
Financial Services		
General Ledger Journal Processes (formerly NON-Pears)	Correction of Non-Compensation expenses posted in error to the departments general ledger (G/L) including recharge processing. Initiate the correction of non-payroll entries on the general ledger (G/L) by moving expenses or updating the Full Accounting Unit (FAU). Corrections could include changing account, sub, object, project or source codes. Requests received after 120 days on the ledger will require additional justification before processing.	5 Business Days
Department Recharges	Used to process a unit's billing to another department for services provided.	10 Business Days
Financial Reporting Assistance	Ad hoc financial reporting , policy exceptions, Audit assistance, request for transfer of funds (TOF), and Pre-Award Budget Information. Proforma Update, All other Financial Requests	Varies
Proforma Update	Initiate this request to update departmental projections/assumptions in the pro formal software	5 Business Days
General Ledger Review	The General Ledger Review report is a detail view of all transactions posted to the General Ledger for accounts that fall within the Department(s) or Unit selected	Varies
Human Resources Request		
Employee Record Adjustments: UC Merced Staff	Includes the processing of Employment Recruitment, Updating TRS supervisors, Equity Increases, Reclassifications, Stipends, Step increases, Employee awards, Employee Separation etc. (For student employees, please open a Student Employee Change Request)	Varies
Employee Record Adjustments: UC Merced Students	Includes the processing of Student Recruitment, Updating TRS supervisors, Reclassifications, Stipends, Step increases, Employee awards, Employee Separation etc. (For student employees, please open a Student Employee Change Request)	Varies
Employee Record Adjustments: Contract/Limited Term	Includes the processing of Recruitment, End Date Extension, Employee conversion from contract to career. (For student employees, please open a Student Employee Change Request)	Varies
Process UC Path Direct Retros and Earning Distribution Changes	Correct and Transfer identified errors in Employee funding source in UC Path	Varies
New Employee Onboarding	Prepare Personnel Action Form (PAF) and follow pre-set checklist for new employees, sending welcome emails; start process to get systems and building access; order live scan; provide information on how to obtain a CatCard; etc. CBS2 will coordinate new hire appointment with Human Resources Payroll Center (HRPC)	By Start Date
Update Department Organization Charts	Update and distribute Department Organization Charts	10 Business Days

Campus System Access and Updates	Submit request for electronic access to buildings and campus systems, e.g. Financial Systems; Post Authorization Notices (PAN) Review; UCMNetID; generic emails, affiliate requests, online directory changes, procurement card applications, travel and entertainment card applications, pro forma updates etc.)	2 Business Days