



SSHA Finance & Operations

Stewardship, Accountability and Compliance

Finance Team

Holly Werner - Financial Analyst

Brian Baker - Financial Services Analyst

Priya Lakireddy - Financial Services Analyst

Roberto Godinez - Administrative Specialist

Christine Tumonong - Financial Supervisor & MSO

SSHA at-a-glance

Organization AB40

134 Faculty

42 Lecturers

29 Staff

18 Payroll Departments

10 Departments

7 Graduate Groups

Center for the Humanities

All adds up to ~600 Accounts

- ▶ Account Management

- ▶ Operational

- ▶ Instructional

- ▶ Faculty Specific

- ▶ Incidentals

- ▶ Start Up

- ▶ Service Compensation

- ▶ Endowments

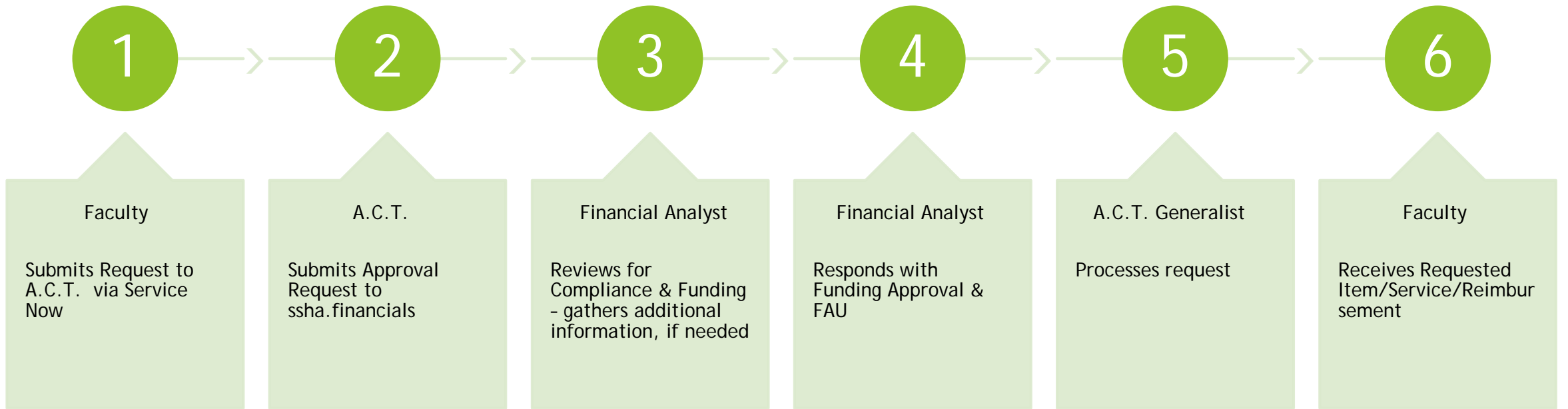
- ▶ Gifts

- ▶ Departmental

- ▶ Grad Group Operational

- ▶ Financial Aid





ACT Approval Cycle

Account Analyst: Analyst's Name
 Analyst's Phone #
[Analyst's Email](#)

Department - Faculty Name

Financial Summary as of: 07/31/19

***** Please Review Individual Project Tabs for Details of Expenditures, Liens & Projections *****
 *** Contact SSHA Finance if Budgets and Expenses Are Not Accurate ***

ACCT	CC	FUND		PROJECT TITLE	Expiration Date	BUDGET	EXPENSES	Future Expenses Liens/Projections	BALANCE
4031XX	XX	19900	<i>INCNDT</i>	Incidentals	Maximum of \$9K Carry Forward allowed	3,000.00	68.47	2,733.03	198.50
4431XX	XX	20095	<i>24FSUP</i>	Start Up	6/30/2024	206,540.38	15,843.09	48,178.75	142,518.54

Additional Financial Services



Petty Cash, Declining Balance Card, Gift Cards



Student Assistant Hiring



Limited Term Staff Hiring



Independent Contractors

Operational Services



SSHA Reception



Faculty Cellphones and Landlines



Equipment Inventory: Theft Sensitive Items

Items over \$5,000.00 (Campus Inventory)
• Audit every 2 years (Dec 12, 2018 deadline)
Computers, tablets, external hard drives,
mobile phones, etc. (Department)

Management Services Officer (MSO) / Chief Administrative Officer (CAO)

- ▶ Signing/Approval authority:
 - LiveScan Form
 - Hiring Process (Budget), HR Forms
 - Mobile Phones, Software requests
 - Financial System Access
 - Travel & Entertainment Card Application
 - Travel Advance
 - Procurement Card Application
 - Business Agreement Request Form
 - Travel approver
 - Account Link
 - Federal Work Study
 - Request for Exception or Additional Approval for University Travel & Entertainment Policy
 - Unauthorized Purchase/Violation of UC Policy BFB BUS-43

Contact Information

- ▶ General SSHA Finance Email: ssha.financial@ucmerced.edu
- ▶ Holly Werner: CIS, ECON, PSY, PH departments, Grad Group & Departmental Funding
 - ▶ Email: hwerner@ucmerced.edu
- ▶ Brian Baker: POLI, GAWS, SOC, ANTH, LIT, CRES departments
 - ▶ Email: bbaker9@ucmerced.edu
- ▶ Priya Lakireddy
 - ▶ Email: plakireddy@ucmerced.edu
- ▶ Roberto Godinez
 - ▶ Email: rgodinez2@ucmerced.edu
- ▶ Christine Tumonong
 - ▶ Email: ctumonong@ucmerced.edu



Atalie Womble, Liaison Diane Caton, Business Officer

- Overview of ACT & ServiceNow benefits
- How to submit requests
- Notifications & tracking
- Tips & guidelines

Shared Services

The department

Administrative Coordination Team

- Leverage resources
- Consistency & compliance

Assigned sub-teams

- Divided by departments
- SSHA Help Desk

The tool

ServiceNow

- Self service
- Service Level Agreements
- Track status

Support SSHA via:

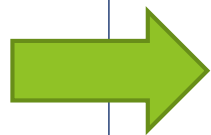
- Purchasing & invoice payment
- Travel reservations
- Reimbursements



UC Merced's Administrative Coordination Team (ACT) is a team of professionals committed to providing the highest level of customer service to the campus by performing work efficiently and effectively, while constantly implementing best practices in the areas of finance and personnel services.

Who ACT Supports

The Office of the Chancellor, SSHA, ORED, and the Divisions of Finance & Administration and Facilities & Campus Operations



SUBMIT A REQUEST

(ServiceNow)



SERVICE LEVEL AGREEMENT



REPORT



CUSTOMER SURVEYS

UNIVERSITY OF CALIFORNIA

MERCED

ADMINISTRATIVE COORDINATION TEAM (ACT)

Division of Finance and Administration

Search this site...

Services

PURCHASING

- [Purchasing and Non-Travel Reimbursements](#)
- [Invoice Processing](#)
- [Mobile Device Purchases \(Cell Phone/MiFi\)](#)
- [Software Purchasing](#) NEW!
- [New Vendor Set-Up](#)
- [Procurement Card Receipts](#)

TRAVEL & ENTERTAINMENT

- [Travel & Entertainment Reimbursement](#) UPDATED!
- [Travel Reservations](#)

Purchasing and Non-Travel Reimbursements

[Submit A Request](#)

Description

To submit a request for purchasing, non-travel and entertainment reimbursements, and recharges. Also includes preparing and submitting requisitions to Procurement Services for processing (all services, purchases above \$10K, restricted items, agreement renewal and request for international vendors).

Customer's Responsibility

Provide quote or detailed description of goods/services, vendor information, account information (Full Accounting Unit [FAU] or nickname), need-by date, business justification and approval(s). If it is an unauthorized purchase, completed documents must also be included.

ACT's Responsibility

Prepare in CatBuy and submit to vendor or Procurement Services for processing. If the request requires a requisition, ACT will monitor until a purchase order (PO) is received from Procurement Services and the vendor has been contacted.

RITM0060221 Opened - Non-PEARS (Non-Payroll Expense Adjustment Request) - Message (HTML)

FILE MESSAGE

Ignore Delete Reply Reply All Forward Meeting IM More

Eliminate Acco... Account Summ... Quarterly Org C... Quarterly Org C... Police To Manager


Move OneNote Actions

Mark Unread Categorize Follow Up


Translate Find Related Select

Delete Respond Quick Steps Move Tags Editing Zoom

Tue 1/23/2018 1:21 PM

 UC Merced Service Desk

RITM0060221 Opened - Non-PEARS (Non-Payroll Expense Adjustment Request)

To  Atalie Womble

UC Merced Administrative Coordination Team (ACT)

The following Non-PEARS (Non-Payroll Expense Adjustment Request) request has been submitted to the ACT on your behalf, [LINK](#) at 01-23-2018 01:19 PM PST

The ACT will begin processing your request shortly. Should there be any issues or questions during the processing of your request an ACT representative will contact you.

To view the status of your request, please go to the ACT Portal and reference Request RITM0060221 or click on this direct [LINK](#)

Please feel free to reach out to the ACT directly by responding to this email, or by calling (209) 228-1228.

The Administrative Coordination Team (ACT)

(209) 228-1228

act@ucmerced.edu

ACT Request RITM0025603 - Travel and Entertainment Reimbursements - Comments added - Message (HTML)

FILE MESSAGE

Ignore Delete Reply Reply All Forward Meeting IM More

Eliminate Acco... Account Summ... Quarterly Org C... Quarterly Org C... Police To Manager Team Email Done Reply & Delete

Move OneNote Mark Unread Categorize Follow Up Translate Related Select Zoom

Wed 1/24/2018 12:33 PM

UC Merced Service Desk

ACT Request RITM0025603 - Travel and Entertainment Reimbursements - Comments added

To Atalie Womble

UC Merced Administrative Coordination Team (ACT)

The following comments have been added to the Travel and Entertainment Reimbursements request RITM0025603 opened by Atalie Womble, or on their behalf:

Updated: 01-24-2018 12:32 PM PST by awomble.

Short Description: TEST
Additional comments:

01-24-2018 12:32 PM PST - Atalie Womble Additional comments
This is how additional comments look in an email.

Please feel free to contact the ACT with any questions regarding these comments.

To view the status of your request, please go to the ACT Portal and reference Request RITM0025603 or click here: [LINK](#).

The Administrative Coordination Team (ACT)

(209) 228-1228
act@ucmerced.edu

Ref:MSG0381908

Comments added:

Informational or call to action

ACT-staff generated

Scroll down

Reply all



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SUBMIT A REQUEST

(ServiceNow)



SERVICE LEVEL AGREEMENT



REPORT








CUSTOMER SURVEYS

"My Orders" shows all your past requests

Home ACT Services Approvals My Orders

Requested Items [Default view] Search Created Search 1 to 100 of 150

All > Request Requested for is Atalie Womble .or. Request Opened by is Atalie Womble > Item = General Purchasing .or. Item = Invoice Processing .or. Item = Travel Reservations .or. Item = Travel & Entertainment Reimbursements

		Number	Priority	Item	Assigned to	State	Short description	Created	Opened by	Requested for	Updated
<input type="checkbox"/>		RITM0107792	4 - Low	General Purchasing	Sarah Anderson	Waiting for Customer	Pay renewal of Certification Fee for ICC Certified Building Official - Expires 9/12/19	08-14-2019 4:28:57 PM	Atalie Womble	Gini Krippner	08-15-2019 10:03:52 AM
<input type="checkbox"/>		RITM0106537	4 - Low	Invoice Processing	Elias Vargas	Closed Complete	Iron Mountain Invoice BTXM551 - DCC shred bins June 2019 billing	07-31-2019 11:41:15 AM	Atalie Womble	Atalie Womble	08-06-2019 2:08:19 PM
<input type="checkbox"/>		RITM0105524	2 - High	General Purchasing	Laura Purkey	Closed Complete	RUSH: computer for Bobbi Ventura-Henderson	07-17-2019 4:41:16 PM	Atalie Womble	Allison Costa	07-23-2019 4:04:40 PM

What's next?

ACT seeks SSHA Financial funding approval and process request

ACT updates requester when appropriate

Deliveries are handled within SSHA; returns by ACT

Tips & Guidelines

- ▶ Make “RUSH” requests obvious
- ▶ Seek a quote, but don't purchase or commit to any goods or services
- ▶ Reimbursed items belong to UCM
- ▶ Business justification; supporting details & attachments
- ▶ Paint entire picture for travel
- ▶ Lodging & meals- paid personally then reimbursed; flight purchase by ACT is encouraged
- ▶ Do not pay for other travelers' expenses
- ▶ Domestic travel reimbursement is for actual expenses, not per diem
- ▶ A mix of business & personal travel is allowed, but has stipulations

UC MERCED



Administrative Coordination Team

General Assistance
act.ucmerced.edu/
act@ucmerced.edu
COB1 - 224 Help Desk

Diane Caton, Business Officer
dcaton@ucmerced.edu

Atalie Womble, Liaison
awomble@ucmerced.edu

Tracey Cox, Generalist
tcox2@ucmerced.edu
(209)756-5172

Laura Purkey, Generalist
lpurkey@ucmerced.edu

Sarah Anderson, Generalist
sanderson28@ucmerced.edu

Heather Sanchez, Generalist
hsanchez30@ucmerced.edu

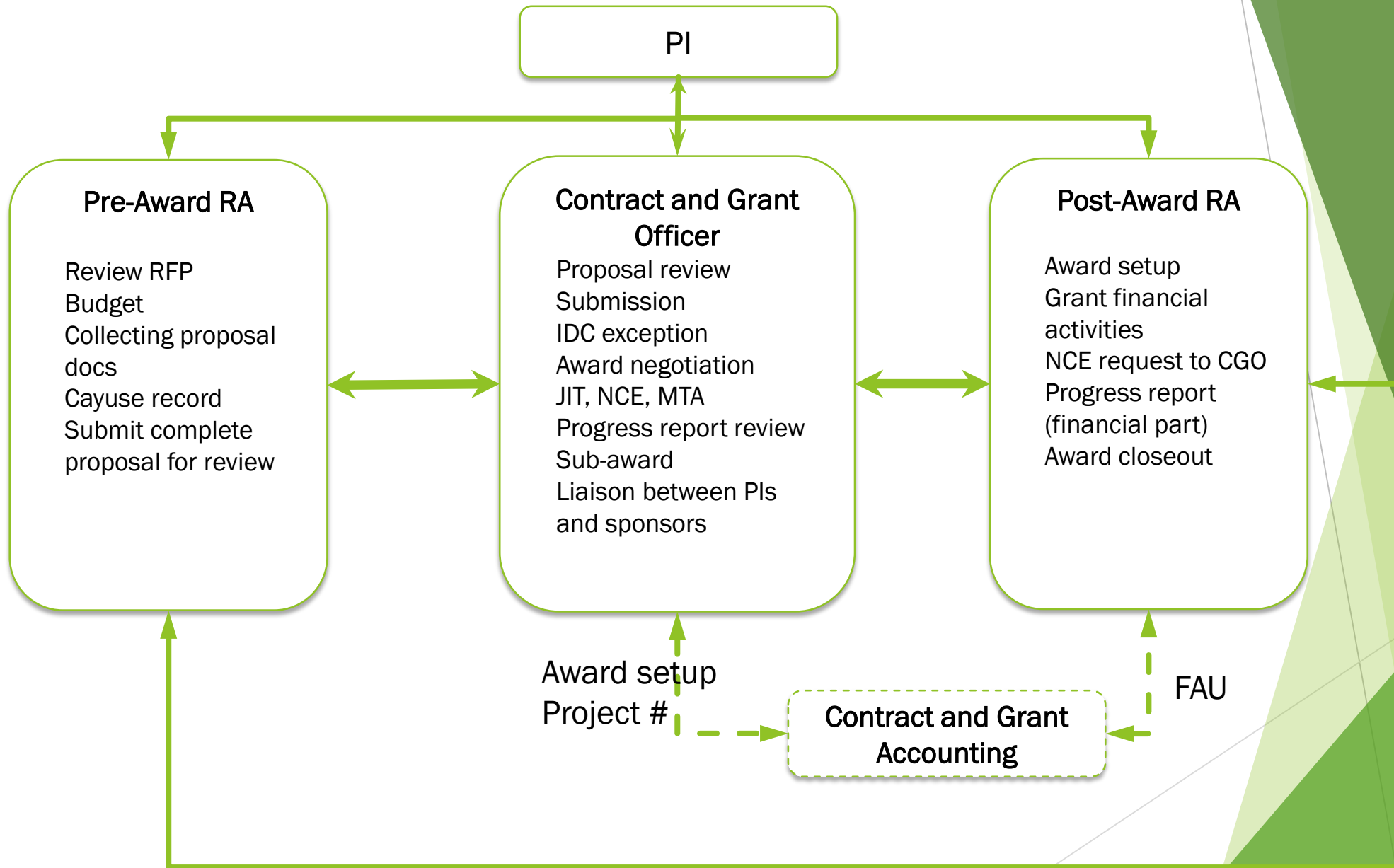
Iyari Ortiz, Generalist
iortiz25@ucmerced.edu



New Faculty
Introduction

Fall 2019

- **Bobcat Buy Training - Access**
 - [UC Learning Center](#)
 - Online training: 3 modules, 20 minutes
 - On campus, in-person option
 - Inclusive demonstration include current vendor catalogue and punchout, document searching, workflow visibility
 - Future vendor enablement plans
 - Q&A important to individual research needs
 - Importance of supporting system-wide agreements
- **Bobcat Buy Project Page - Resources**
 - bobcatbuy.ucmerced.edu
 - Log In
 - FAQs
 - Quick Reference Guides
 - Service Desk
 - Training Videos



Contact Information

- ▶ Tuccoa Polk, SSHA Research Administration
- ▶ ssha.grants@ucmerced.edu
- ▶ 209-201-5651

- ▶ Jue Sun, Director
- ▶ Sponsored Research Services
- ▶ jsun8@ucmerced.edu
- ▶ 209-201-2039