Interacting with the Shared Services Center (SSC)

July 2015

Providing a service that contributes to the mission of each unit
is the true measure of success for the SSC.
-Pamela Gabel, Executive Director

SHARED SERVICES CENTER
UNIVERSITY OF MICHIGAN

Agenda

- Updates and Tips
- Office hour

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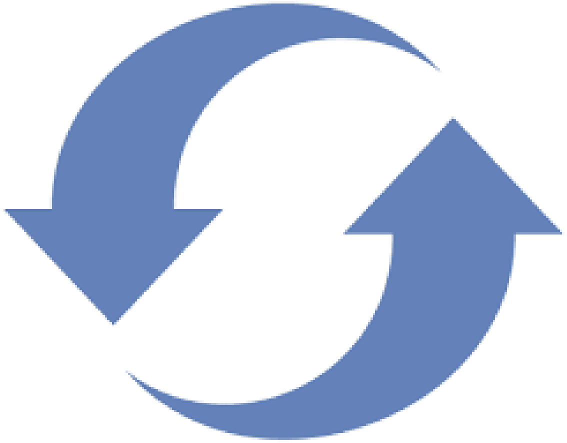
General Updates

- Fiscal Year End
- eForms improvements
- New lump sum form available
  - SSC website Forms page: ssc.umich.edu/forms



CaseConnect

Coming July 30, 2015! New Look and Feel for CaseConnect

- Functionality is not changing
- Resource materials are being updated to reflect the new user interface
    - Updated materials will be available on the SSC website CaseConnect page by July 30:

      ssc.umich.edu/caseconnect

CaseConnect Tips

Locating Documents Related to Your Active Case(s)

- To view document(s) related to your active case, click the link in the email message you receive to access the case itself
- Related documents are attached to the case, and not to email message itself

CaseConnect Tips

Access to your cases in CaseConnect

- You and anyone on the Watch List have access to your active cases
  - If you are not the requester or on the Watch List, you do not have access to the case in CaseConnect
  - For questions: email sharedservices@umich.edu or call 5-2000
- After a case is resolved, you have access to it for 5 days before it drops off your list

Finance Contact Center – Tips

How we can assist you best

- We are your first point of contact for inquiries and support
  - Share details about your inquiry for best service

For faster service

- Provide key information related to your inquiry (e.g., case number, purchase order number, voucher or invoice number, etc.)
- Reply directly to email(s) received from the SSC or use Additional Comments through CaseConnect

Visit the SSC Website – An Informational Resource

- Visit ssc.umich.edu for information about SSC services and to locate forms (downloadable) and eForms for requesting service

Finance – Travel & Expense Tips

1. Per diem
2. Non-employee expense reimbursements
3. Submitting requests for multiple employees
4. Receipts
5. Business Purpose

Finance – Travel & Expense

Business Purpose Guide

- Locate the Business Purpose Guide – and other best practices for employee expense reimbursement - on the Procurement Services website:

  procurement.umich.edu/travel-expense/reporting-expenses/resources

- The guide groups typical university expenses into categories which may or may not require additional information in the business purpose field. For example:
  - For research-related expenses, it is allowable to state only "Research" in the business purpose field

Finance – Accounting Customer Service

Improving the Notifications for Project/Grants and ShortCodes

- Based on your feedback, we are seeking your input on the following proposed changes to the notifications for P/G and ShortCode requests:
  - Include more detailed information in the notification
  - Include the SAPOC and PI (or only the SAPOC) as notification recipients

Let's take a look at the proposed notification.

Proposed Notification for Project/Grants and ShortCodes

Hello

This email contains important information about your new project grant. Please let me know if you need any additional information.

Your new Project Grant is: P123456
Title: A new Project for SSC Research
Related Shortcode: 012345

Project Director: John Smith
Project Dir. Uniqname: jsmith

Admin Point of Contact: Jane Doe
Admin uniqname: janedoe

Project Grant time Period: 05/01/2015 to 04/30/16
Source of Funds: Office of Research

Purpose: Office of Research Faculty Grants and Awards.

Thank you,
Name

Project Grant Number
Title
ShortCode

Project Director

SAPOC

P/G Time Period
Source of Funds

Purpose

Finance – SOA Reconciliation

Attach in eReconciliation

Complete Supporting Documentation eForm

Navigate to CaseConnect, add Additional Comments and Support

Reply to email from CaseConnect

Four ways to submit documentation to SSC

Finance – SOA Reconciliation

- If you receive invoices in your unit, write “OK to pay” or “Received” on the invoice
- SSC uses eForms for reconciliation
- SSC waits 5 business days after hosting events posts to SOA to reach out to units
- After submitting support using the eForm, state changes to *Pending* and the reason is *Customer Schedule*

Finance – SOA Reconciliation

Reconciliation Detail Report

- Run as needed and after notification that previous month has been reconciled
- Can view all transactions, reconciled or outstanding
- Includes details from eReconciliation
- Delay for some data is possible

MY CRITERIA: save criteria reset criteria to default

Refresh

Selected Funds: Operating Funds (click here to update criteria)

Selected Departments: Shared Services Center (click here to update criteria)

Selected Programs: All (click here to update criteria)

Selected Projects: All (click here to update criteria)

Journal Start Date:* 5/1/2015 Journal End Date:* 5/31/2015

Reconciled* Yes / No / All Exception Type All Types

1 of 135 100% Find | Next

Actuals Activity

⊟ Show/Hide More Details

Jrnl Date	Account Description	Transaction Description	Ref/Item Term Descr	Voucher/Item Type/Rate	Merchant/Vendor/Item Type Descr/Hours	Pcard Holder/SUB Uniqname	Paid Amount	Jrnl ID	Jrnl Ln	Account	Recon?	Status
5/31/2015	Univ Invest Pool Income Alloc	UIP - AUX OTHER ANN ARBOR					$0.01	UIP0000014	1,344	408300	Y	6 Complete - Autoreconciled
5/31/2015	Univ Invest Pool Income Alloc	UIP - AUX OTHER ANN ARBOR					($0.45)	UIP0000014	1,345	408300	Y	6 Complete - Autoreconciled
5/31/2015	Univ Invest Pool Income Alloc	UIP - DESIGNATED ANN					($0.05)	UIP0000010	2,697	408300	Y	6 Complete - Autoreconciled
5/31/2015	BOR Recharge Revenue for B & F	5/15 SSC BridgeFunding	SSC				($154,712.44)	FIN0003345	47	410025	Y	6 Complete - Autoreconciled
5/31/2015	BOR Recharge Revenue for B & F	5/15 SSC BridgeFunding	SSC				($48,856.56)	FIN0003345	48	410025	Y	6 Complete - Autoreconciled
5/31/2015	BOR Recharge Revenue for B & F	5/15 SSC Chargeback	SSC				($617,234.76)	FIN0003345	44	410025	Y	6 Complete - Autoreconciled
5/31/2015	BOR Recharge Revenue for B & F	5/15 SSC Chargeback	SSC				($194,916.24)	FIN0003345	45	410025	Y	6 Complete - Autoreconciled
5/1/2015	Trsf Approp Staff Salaries	Monthly tsf AP to SSC Fin	BOR				($21,194.97)	FIN0003314	2	450200	Y	6 Complete -

Finance – Accounts Payable

- Items requiring research
- Invoice numbering protocol update
- Freight charges on a PO
- Negative lines on a PO
- Wire payment form trend
- FAQs coming soon

Finance – Vendor Management

FATCA Foreign Account Tax Compliance Act

- Compliance by January 1, 2016
- FATCA Toolkit/Chapter 4 (on SSC website)

Pilot Program Reimbursements for Guest and Students

- Reimbursement Definition – Individual used personal funds for university business and needs to be reimbursed

Finance – Accounts Receivable

Updated AR SPG (501.05)

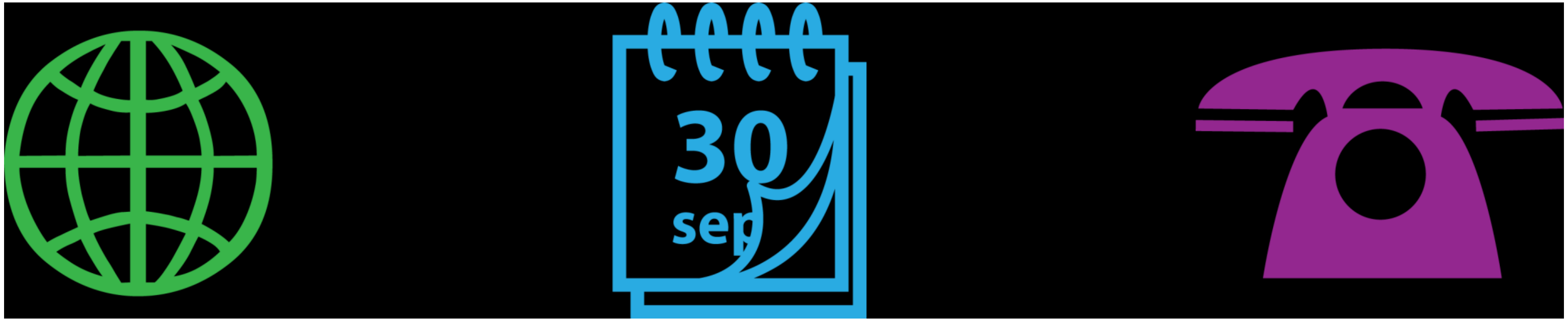
- Effective July 1, 2015
- Links to the updated SPG are available at:
  - SPG website SPG 501.05 Accounts Receivable
  - SSC website Accounts Receivable section

Various Sponsor Projects

- Reminder – effective July 1, 2015, all units please use the upload file located on the SSC website Forms page

HR – Data Management

PAR II launched June 29th



- Job Aids in My LINC
- HRRIS-developed job aids

- Visit HRRIS website to sign up for unit training:
  1. Sign up information in Google Drive
  2. Search *HRRIS Unit Support* for sign up sheet

- Phone support provided by SSC by calling 615-2000

HR – Benefits

Open Enrollment 2015

October 26 - November 6

HR – Time & Leave Administration

Static group vs. dynamic group

Static Groups	Dynamic Groups
• Employees without common criteria • Requires regular maintenance and updating • Best for smaller groups, groups with low turnover, and custom groups who have no common criteria	• Employees share a common criteria, such as Supervisor ID, Department ID, etc • Automatically populated via an overnight download • Best for large groups with high turnover, but are not limited to any size group

HR – Employment / I-9

Peak I-9 processing

- Peak period runs from August 17 – September 11
- Additional locations and staffing
  - Locations will be published on the SSC Regional I-9 Centers website on July 31
- Special Event I-9 processing still available during this time period.

Stay in Touch!

Join SSC MCommunity email groups

Join today to stay informed about SSC process changes, tips & tricks, interacting with the SSC, and more

FIN= ssc.finance.updates

HR= ssc.hr.updates

THANK YOU & WRAP UP

QUESTIONS?

OFFICE HOUR (Optional)

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