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
Agenda

• Updates and Tips
• Office hour
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
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
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](http://ssc.umich.edu) for information about SSC services and to locate forms (downloadable) and eForms for requesting service
Finance – Travel & Expense Tips

- Per diem
- Non-employee expense reimbursements
- Submitting requests for multiple employees
- Receipts
- 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.
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. Username: jsmith

Admin Point of Contact: Jane Doe
Admin Username: 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
Four ways to submit documentation to SSC

- Attach in eReconciliation
- Complete Supporting Documentation eForm
- Navigate to CaseConnect, add Additional Comments and Support
- Reply to email from CaseConnect
<table>
<thead>
<tr>
<th>Description</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>If you receive invoices in your unit, write “OK to pay” or “Received”</td>
<td>If you receive invoices in your unit, write “OK to pay” or “Received” on the invoice</td>
</tr>
<tr>
<td>SSC uses eForms for reconciliation</td>
<td>SSC uses eForms for reconciliation</td>
</tr>
<tr>
<td>SSC waits 5 business days after hosting events posts to SOA to reach out</td>
<td>SSC waits 5 business days after hosting events posts to SOA to reach out to units</td>
</tr>
<tr>
<td>After submitting support using the eForm, state changes to Pending and</td>
<td>After submitting support using the eForm, state changes to Pending and the reason is Customer Schedule</td>
</tr>
<tr>
<td>the reason is Customer Schedule</td>
<td></td>
</tr>
</tbody>
</table>
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
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**

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