

Berkeley Campus Shared Services

Service Overview



This document describes the scope of services provided by Campus Shared Services, including associated policies and administrative procedures. This document, formerly referred to as the Service Level Agreement (SLA), applies uniformly to all UC Berkeley units unless a Memorandum of Understanding (MOU) is in effect to accommodate a special/unique business need. Unit leaders who feel that their units require services or service levels outside the scope described in this document should contact their respective **CSS Service Director**.

Updated as of September 2016

Berkeley Campus Shared Services

Table of Contents

Table of Contents.....	ii
Section I. Campus Shared Services Overview.....	3
Campus Shared Services Mission and Objectives.....	3
Services Offered.....	3
Campus Shared Services Organizational Structure.....	3
Section II. How to Contact Campus Shared Services.....	3
Service Availability and Methods for Requesting Service.....	3
Section III. Service Team Structure and Unit Participation.....	4
Service Team Structure.....	4
Section IV. CSS Funding Model and Cost of Services.....	4
Cost of Services.....	4
Section V. Performance Standards and Escalation.....	4-5
Governance and Feedback Mechanisms.....	4
Performance Standards and Metrics.....	4
Escalation Process.....	5
Continuous Improvement.....	5
Section VI. Services Offered.....	6-10
CSS Business & Financial Services (B&FS) Scope of Services.....	6
CSS Human Resources & Academic Personnel Support (HR/APS) Scope of Services.....	7
Academic Titles – Scope of Work for Campus Shared Services HR.....	8
CSS Information Technology (IT) Scope of Services.....	9
CSS Research Administration (RA) Scope of Services.....	100

Berkeley Campus Shared Services

Section I. Campus Shared Services Overview

Campus Shared Services Mission and Objectives

In alignment with the **Berkeley Operating Principles** and the **Campus Shared Services Guiding Principles**, Campus Shared Services (CSS), a division of the Office of the Vice Chancellor for Administration and Finance, provides reliable, high-quality administrative support to faculty, academics, staff, student employees and retirees in support of the UC Berkeley mission of teaching, research and public service.

Services Offered

CSS provides administrative services to campus units in the following functional areas, unless otherwise noted in the unit's Memorandum of Understanding:

- **Business & Financial Services**
- **Human Resources/Academic Personnel Support**
- **Information Technology**
- **Research Administration**

Detailed service menu guides, which list the scope of services provided in the functional areas, can be accessed via the CSS website by clicking on the functional area link listed above. The detailed service menu guides describe the services available and the responsibilities of the Unit, CSS, and Central Campus units. An overview of services and performance standards can also be found in Section V of this Document, and specific escalation paths and contact information can be found on the home page of the CSS website, sharedservices.berkeley.edu, under "Find Your Unit Profile."

Campus Shared Services Organizational Structure

The CSS organization has a matrix structure in order to ensure accountability and cross-functional coordination. CSS Functional Directors report both to the CSS Chief Operating Officer and to their respective Campus Functional Leader counterparts (e.g., CIO, CFO). CSS Service Directors report to both the leadership of the units they support (e.g., dean, VC) and to the CSS Chief Operating Officer. The CSS leadership team information is located on the CSS website, under CSS Leadership which can be accessed by [clicking here](#).

Section II. How to Contact Campus Shared Services

Service Availability and Methods for Requesting Service

Standard Hours of Operation: Monday – Friday, 8:00am – 5:00pm. Additional hours may be accommodated based on a unit's special business need, as indicated in the unit's MOU.

CSS Main Physical Address: 1608 Fourth Street Berkeley, CA 94710-7600 Mail Code 7600	Phone Number: 510-664-9000 <ul style="list-style-type: none">• IT: option 1• B&FS: option 2• HR/APS: option 3• RA: Find your RA
Additional Methods for Requesting Service: <ul style="list-style-type: none">• Website: sharedservices.berkeley.edu• BearBuy: bearbuy.is.berkeley.edu (CSS Non-Purchase Request Form)	Email/Open a ticket: <ul style="list-style-type: none">• B&FS: bnfscsshhelp@berkeley.edu• HR/APS: Open an online HR/APS service request• IT: Open an online IT service request• RA: Find your RA

Section III. Service Team Structure and Unit Participation

Service Team Structure

Campus units have been grouped into teams (1-9) based on their operational and/or organizational similarities. These teams of units are served by corresponding service teams within CSS. Service Team contact information can be found on the home page of the CSS website, sharedservices.berkeley.edu, under "Find Your Unit Profile."

CSS Service Team

In addition to service teams within each CSS functional area, units have additional resources to assist with business needs and problem solving. These resources consist of:

- **Service Directors**

The Service Director works closely with the Campus leadership and the Unit Liaisons to ensure that service delivery needs are met. The Service Director reports to both the CSS Chief Operating Officer and the deans, vice chancellors, or other campus leaders of the units served by their teams. [Click here](#) to view a full listing of the CSS Service Directors, their contact information, and their roles and responsibilities.

Section IV. CSS Funding Model and Cost of Services

Cost of Services

The **original CSS funding model** was approved by the OE Executive Committee in February 2013 and was in effect through June 30, 2016. The funding model for FY16/17 – forward is being reviewed.

Section V. Performance Standards and Escalation

Governance and Feedback Mechanisms

CSS is a division of the Office of the Vice Chancellor for Administration and Finance. CSS has several avenues for seeking campus feedback and participation in its development. [Click here](#) to view the current membership of the advisory committee that provides feedback and input to CSS leadership.

Performance Standards and Metrics

CSS is continuing to develop a comprehensive performance and metrics dashboard, which reports performance against service satisfaction, staff satisfaction, and financial goals. Due to current systems limitations, CSS is not yet able to provide reports on all of its performance targets. Improved data will be available once the Service Now system is fully implemented. Performance against standards is measured regularly and reported through governance and stakeholder groups, on the CSS website, and through other communications.

Service commitments, as outlined by CSS functions, describe the service performance standards for requests, including turnaround times, escalation intervals, status updates to units served, actions on close, and other key metrics. To view the priority and service level targets of CSS, please click on the functional link below.

- [Business & Financial Services](#)
- [Human Resources/Academic Personnel Support](#)
- [Information Technology](#)
- [Research Administration](#)

Berkeley Campus Shared Services

Escalation Process

Units can escalate feedback or any issues with service directly to the CSS functions at:

- B&FS: bnfscsshhelp@berkeley.edu
- HR/APS: hrapscsshhelp@berkeley.edu
- IT: itcsshhelp@berkeley.edu
- RA: [Find your RA](#)

Units may also escalate feedback to the Service Director and Service Partner assigned to their Unit, or to the CSS Chief Operating Officer. Service Directors contact information is available on the CSS website, sharedservices.berkeley.edu, under “Find Your Unit Profile.”

Continuous Improvement

Continuous improvement is not a project or a program – it’s a way of operating. It’s about creating a learning environment that involves and empowers staff to innovate and drive improvements in service and cost efficiencies. When we reach a culture of continuous improvements, we will have all staff actively working together on proactive problem solving, continuously learning and improving the processes and experiences the campus and our staff feel every day. It’s also a partnership with the campus customers we serve and gathering their input is crucial so that we’re making improvements that make sense and also make it easier for clients to get service from CSS.

This culture in CSS is one that fosters teamwork, participation, learning and flexibility and proactively approaches problem prevention –it’s a matter of *“our people supporting what they help to create”* by modeling a culture of **inspiring, involving and empowering**.

Berkeley Campus Shared Services

Section VI. Services Offered

CSS Business & Financial Services (B&FS) Scope of Services

Business & Financial Services		
<i>Click here to view the detailed service menu guide</i>		
Procurement	T&E Reimbursements	Recharge
<ul style="list-style-type: none">• Receive and process non-T&E reimbursement requests• Receive and process general purchase requests• Receive and process carts in BearBuy• Assist Buyer to complete order• Vendor set up• Match exception• Change orders• Voucher approval• Verify receiving• Outstanding invoice & vendor research	<ul style="list-style-type: none">• Receive forms and documentation to support T&E reimbursements• Assemble and analyze documentation• Assist with obtaining exceptional approvals• Vendor set up• Process in T&E system• Review for policy and compliance and approve• Submit to disbursement for payment	<ul style="list-style-type: none">• Provide IOC billing transactions and reconciliation• Prepare recharge journals• Prepare statements

Examples of the types of work that are included/not included in the CSS Scope of Services are available on the CSS website, which can be accessed by [clicking here](#).

Berkeley Campus Shared Services

CSS Human Resources & Academic Personnel Support (HR/APS) Scope of Services

Human Resources / Academic Personnel Support Services				
<i>Click here to view the detailed service menu guide</i>				
Recruiting	Appointments	Benefits & Leaves	Compensation	
<ul style="list-style-type: none"> • Confirm HCM position • Post job in TAM³ • Administer AP Search & AP Recruit² • Recommend and coordinate advertising • Schedule interviews³ • Screen resumes³ • Check references³ • Prepare, send, receive offer letter/contract³ • Prepare documents for policy exceptions & waivers • Work study and student employee recruitment and new hires 	<ul style="list-style-type: none"> • Coordination of appointments, reappointments, merits, promotions, research recall² • Administer VSPA Gateway² <p>New Hire / Onboarding</p> <ul style="list-style-type: none"> • Coordinate pre-employment screening and background checks • Send welcome email and onboarding package • Coordinate hiring paperwork • Conduct onboarding sessions <p>Visas</p> <ul style="list-style-type: none"> • Preparation and coordination of applications to be sent to BIO 	<ul style="list-style-type: none"> • Advising on Health and Welfare programs • Process benefits forms and actions (including family member eligibility verification process) • Claims resolution and service facilitation (health care, disability, death, COBRA, etc.) • Leave Admin (FMLA, Worker's Comp, etc.) • Review/Coordinate timekeeping for Leaves • Coordinate Leave • Coordinate interactive process (e.g., ADA) • Prepare medical separation documents • Coordinate return to work accommodations 	<ul style="list-style-type: none"> • Job descriptions development support • Coordinate classifications & reclassifications • Prepare documents for salary adjustments • Coordinate performance based award process (in conjunction with Performance Management) • Coordinate Recognition awards payments and additional payments • Process Summer Salary¹ • Coordinate Multi-location appointments • Advise salary setting² 	
Performance Management	Employee Relations	Records Management	Separations	Payroll and Timekeeping
<ul style="list-style-type: none"> • Track and advise on Probationary status • Provides counsel to EE around Performance Management processes • Supports Central HR with annual evaluations and escalates unsatisfactory ratings • Provides coaching to managers on performance issues 	<ul style="list-style-type: none"> • Counsel and advise unit and employee on policies • Advise on disciplinary actions & assist in preparing documentation • Assist with preparation of complaint & grievance material • Union booklet distribution • ASMD Coordination² (and ASEs) 	<ul style="list-style-type: none"> • Maintain personnel, medical and I-9 files • Calculate seniority points • Coordinate service awards • Process deductions • Employment verifications service • EDD verifications and audit • Provide standard employment data reports 	<ul style="list-style-type: none"> • Coordinate voluntary & involuntary separations including non-reappointments¹ • Conduct exit Interviews • Prepare and coordinate layoffs 	<ul style="list-style-type: none"> • Payroll and Timekeeping auditing and processing • Auditing of tickets and PPS • Overpayments and underpayments • Terminal vacation pay • Compensatory time election • Leave accruals • Earnings distribution changes • Expense transfers • Payroll and timekeeping corrections • Retroactive payments • Layoff payments • Separation payments • Worker's Comp deductions

¹ All Academic Titles

³ Staff positions only

² Research Academics and Non-Employees only

Examples of the types of work that are included/not included in the CSS Scope of Services are available on the CSS website, which can be accessed by [clicking here](#).

Berkeley Campus Shared Services

Academic Titles – Scope of Work for Campus Shared Services

Academic Titles Managed by CSS	Academic Titles Managed by Campus Units
<ul style="list-style-type: none"> • Professional Researcher • Specialist • Project Scientist • Other Researcher (e.g., Visiting Researcher, Visiting Project Scientist) • Postdoctoral Scholar • Visiting Scholar¹ • Visiting Student Researcher¹ • Unpaid Student Facilitator • Contingent Worker (e.g., Intern, Volunteer, Affiliate) • Graduate Student Researcher³ 	<ul style="list-style-type: none"> • Dean/Vice Provost • Ladder Rank (Professor, Associate, Assistant, Agronomist, Supervisor of Physical Education) • Lecturer with Security of Employment • Clinical • Professor in Residence • University Librarian • Librarian (Librarian, Associate, Assistant) • Lecturer Pre-6 • Lecturer Continuing • Other Unit 18 (e.g., Field Program Supervisor, Field Work Coordinator, Teacher-Special Program) • Instructional Assistant • Adjunct • Military/Air Science & Tactics Assistant • Visiting Professor • Academic Administrator • Academic Coordinator • Coordinator of Public Programs • Continuing Educator • University Extension • Cooperative Extension Specialist • Academic Student Employees (e.g., Graduate Student Instructor, Reader, Tutor, Acting Instructor) • Graduate Student Researcher³

The term “manage,” referenced above, refers to (not an exhaustive list):

- a) Assisting with writing of position descriptions, proposing appropriate classifications, levels, and salary ranges
- b) Entering information into AP Recruit and AP Search
- c) Coordinating Exceptional Permission to Recruit requests and appointment cases
- d) Soliciting of outside letters for new recruitments and advancement cases
- e) Initiating invitations and completing invitations in VSPA Gateway
- f) Preparing offer/appointments letters
- g) Maintaining personnel files
- h) Coordinating reappointments and academic advancement cases
- i) Coordinating voluntary and involuntary separations
- j) Counseling on performance management
- k) Advising, and escalating as appropriate, on Employee and Labor Relations policies and issues
- l) Coordinating Active Service Modified Duty (ASMD)
- m) Coordinating multi-location appointments

¹ There may be some instances (e.g., formal visiting scholar programs such as Berkeley Law Visiting Scholars Program; College of Engineering Visiting Industrial Fellows Program; Haas School of Business Visiting Scholar Program; Institute of East Asian Studies Visiting Scholars Program; Institute of Slavic, East European, and Eurasian Studies Visiting Scholar Program, etc.) in which the local Unit will coordinate pre-arrival activities such as the VSPA Gateway application and the eScholar visa application.

² There may be exceptions, based on business needs (e.g., Service Team 9 (i.e., RES) may support the Academic Coordinator title).

³ The extent of Campus Shared Services’ role relative to “managing” the Graduate Student Researcher title varies based on the nature of each department and the funding source of its Graduate Student program.

Berkeley Campus Shared Services

CSS Information Technology (IT) Scope of Services

Information Technology Services			
<i>Click here to view the detailed service menu guide</i>			
End User Device Support	Application Support	Device Procurement	Device Provisioning
<ul style="list-style-type: none"> • General troubleshooting • User setup • Install/upgrade software or hardware • Printer/ Multi-Functional Device (MFD) support • Security issues • Active Directory changes 	<ul style="list-style-type: none"> • BearBuy • CalPlanning • CalTime • CalAnswers • bCal • bMail • bDrive • Box.net • BFS/BAIRS 	<ul style="list-style-type: none"> • Desktops • Laptops • Smart Phones • Tablets • Printers • MFDs (with BAS) 	<ul style="list-style-type: none"> • Desktops • Laptops • Smart Phones • Tablets • Printers

Level 1 = Critically impairs immediate user's required functionality or affecting multiple users. Example: The entire campus is experiencing outage or networked multi-functional device is out of order.

Level 2 = Impairs user functionality.
Example: A department is experiencing outage.

Level 3 = User can work, but with some loss of functionality/or longer-term project required.
Example: User needs software installation but it is not required immediately.

Level 4 = All ladder faculty and senior leaders or other critical roles as defined by the unit served.

NOTE: *Service levels only apply if end-to-end process is under CSS-IT control. If we are working with Campus IT, we will communicate to the client and keep them updated of the resolution status. A list of the processes that are not fully under CSS-IT control is available on the CSS website, which can be accessed by [clicking here](#).*

Berkeley Campus Shared Services

CSS Research Administration (RA) Scope of Services

Research Administration Services <i>Click here to view the detailed service menu guide</i>			
Pre-Award: Proposal and Negotiation Support	Post-Award: Award Set-Up, Management, and Closeout; Fund Management	Compliance	Other Activities
<ul style="list-style-type: none"> • Manage proposal development process and timelines, including sub-recipients • Prepare/edit proposal budgets and budget narratives, with PI/PD • Document cost share • Facilitate non-technical proposal components • Coordinate compliance elements, including COI & research subjects • Prepare proposal forms • Coordinate sub-recipients • Coordinate with collaborating institutions/senior personnel • Request exceptional PI/PD status • Submit proposals to SPO/IAO • Complete agency requested revisions • Request fund advances • Work with PI to provide additional/ revised documents, as requested • Work with PI to complete compliance requirements 	<ul style="list-style-type: none"> • Verify award set-up and review with PIs/PDs/faculty • Work with PIs/PDs/faculty to initiate spending • Request sub-award set-up • Review personnel effort • Ensure capital equipment/ fabrication is in BETS • Facilitate technical/ progress & financial report submissions • Sub-recipient monitoring • Request grant/budget amendments & no-cost extensions through SPO/IAO • Facilitate award closeout process • Retain records, as required • Maintain fiscal oversight and management, including monthly reviews, reconciliations, reporting to PIs/PDs/faculty, and projections • Verify/review all expenditures and cost transfers to ensure accordance with terms and conditions of the awards and University policies • Provide analysis and guidance to PIs/PDs/faculty to inform their decision making • Fulfill SAS-115 requirements • Prepare customized invoices • Manage cost share and prepare reports • Escalate issues/ concerns, as appropriate 	<ul style="list-style-type: none"> • Adhere to OMB Circulars • Review accuracy of effort reporting and ensure timely completion • Coordinate COI reporting • Comply with terms of awards; all State and Federal regulations; all appropriate University payroll, reimbursement, accounting, and personnel policies and practices • Verify human/animal subject protocols are approved and current • Assist central offices in responding to auditing requests (internal and external auditors) 	<ul style="list-style-type: none"> • Coordinate research gifts • Cash handling (e.g., depositing of checks, credit card revenue reconciliation, petty cash)

Examples of the types of work that are included/not included in the CSS Scope of Services are available on the CSS website, which can be accessed by [clicking here](#).