THE CONCEPT

The Business Service Center (“BSC”) is intended to serve as a team of experts to assist with operational support activities in Finance. The BSC will provide transaction support for select activities and will serve as the primary point of inquiry for those activities and related processes to their areas of responsibility.

AREAS OF RESPONSIBILITY

The BSC will be comprised of a team of specialists that support elements of the day-to-day business operations of UTRGV’s divisions and academic units. Throughout the fall 2015 academic semester, the following processes will be rolled out in “waves” to allow a seamless transition for UTRGV:

<table>
<thead>
<tr>
<th>Wave 1 (September 8)</th>
<th>Travel &amp; Business Expense Reimbursement Credit Card/Travel Gas Cards Checkouts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wave 2 (October 5)</td>
<td>Budget Revisions/Transfers Financial Monitoring</td>
</tr>
<tr>
<td>Wave 3 (November 2)</td>
<td>Account Reconciliations Financial Transactions/Corrections Change Order Requests</td>
</tr>
</tbody>
</table>
**BSC ROLES**

**FINANCE**

The following outlines the responsibilities of the BSC as they pertain to the different finance activities.

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>FINANCE RESPONSIBILITIES OF BSC</th>
</tr>
</thead>
</table>
| **Travel & Business Expense Reimbursement** | **Receive and Verify Receipts:** BSC staff will receive receipts, when necessary, verify for completeness/compliance, and work with departments to answer questions regarding the reimbursement process.  
**Reconcile Reimbursements:** BSC staff will then reconcile the receipts and expense information and match these to the PO generated when the travel or expense was authorized.  
**Credit Card and Travel Gas Cards Checkouts:** The Service Center will hold and check out credit cards and travel gas cards at both the Brownsville and Edinburg campuses, and receive the cards after the transactions are completed. |
| **Budgetary Transactions and Financial Monitoring** | **Initiating Requests:** While departmental end-users will initiate most requests, the BSC can work with departments to initiate budget revisions, financial transfers, and other similar budgetary transactions.  
**Monitoring and Coordinating Approvals:** If any budget transfers require additional approvals, such as another account manager or central administrative approver, the BSC will monitor those approvals and follow up as needed.  
**Run Deficit Reports:** The BSC will proactively run reports that identify departments running a projected “deficit” throughout the year. The BSC will reach out to those departments to alert the account managers and other pertinent stakeholders about adjustments needed in their accounts.  
**Account Resolution:** In the event accounts run into deficit and/or adjustments to accounts need to be made, the BSC will work with the account managers to walk through the financial issues facing those departments, and come up with ways to address any financial shortfalls through various methods (e.g. moving expenses to other accounts, processing budget adjustments, etc.). Account managers can also reach out to the BSC for assistance in reading and understanding financial reports. |
<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>FINANCE RESPONSIBILITIES OF BSC</th>
</tr>
</thead>
</table>
| Account Reconciliations and Financial Transactions | **General Assistance and Process Questions:** The BSC will have a deep understanding of the account reconciliation process, and be able to support account managers that have general questions and troubleshoot issues departments may face when performing reconciliations. Sample issues can include:  
  - Providing departments with templates to track expenses and revenues  
  - Assisting in validating journals and other transfers between accounts  
  - Assisting with account and e-type corrections  
  - Providing assistance in standardizing the reconciliation process  

**Perform Technical Reviews:** BSC staff will work with the departments and central administrative offices to perform technical reviews and ensure all the necessary forms, fields, and information is complete, accurate, and accomplishes what the initiating department wishes to accomplish.  

**Ad-Hoc Reporting:** The BSC will have the ability to run various financial reports for account managers and other customers on an ad-hoc basis when there is a need to have financial data.  

**Post Journal Entries:** The BSC will have the authorization to complete routine journal entries on behalf of the department, or to escalate journal entries to the Comptroller’s Office in the case of outlier transactions.  

**Fill-in Reconciliations:** In the event an account manager or support staff are not available to perform reconciliations, the BSC can perform the reconciliations on behalf of that department.  

**Audit Reconciliation Compliance:** The BSC will ensure that reconciliations are performed in a timely manner, and signed off by the appropriate account manager. In the event reconciliations are not done correctly, the BSC can review the policies and procedures with the account manager and reconciler for that department, and make certain recommendations to ensure compliance.  

**Change Orders:** Once departments submit change order requests through SciQuest, the BSC will process these for departments, including requests to disencumber funds, change account numbers, correct e-types, etc.  

**Allowability:** The BSC will answer questions as it pertains to using specific accounts for purchases, and work with departments on ensuring funds are used appropriately.
INQUIRY RESPONSE

In addition to transaction support, the BSC supports inquiries related to the above activities. If the BSC staff does not possess the knowledge to answer a particular inquiry, they will elevate your request to senior level staff in the BSC, direct you to specific personnel in a central administrative unit, or follow-up with you once they have conducted research related to your specific inquiry. Examples of common inquiries the BSC receives include, but are not limited to:

FINANCE

- How much money do I have left in my account to date?
- How do I perform an account reconciliation, and why do I have to do it?
- I don’t have any funds in my travel budget but I want to go to a conference, can I transfer funds into the travel pool?
- What’s the status of my reimbursement?
- Can I use this account to purchase food?

TRAINING AND ADDITIONAL INFORMATION

Visit the BSC website at: www.utrgv.edu/bsc for more updates and information.

CONTACT

Divisions / Units / Departments each are assigned a primary and secondary contact at the Business Service Center. These staff members should be the first point of contact. However, the Business Service Center also has a front desk for walk-up inquiries and general inquiries.

MAIN DESK

Main Email: bsc@utrgv.edu
Main Desk Phone: Edinburg - 956-679-4049
Brownsville – 956-882-7569
Director: Linda Helgeson
Linda.helgeson@utrgv.edu
Coordinators:
Erika Benitez
Erika.benitez@utrgv.edu
Nelly Gomez
Nelly.gomez@utrgv.edu
Cristina Hinojosa
Cristina.hinojosa@utrgv.edu
Main Desk Location – Edinburg

Between the UCBR and BDIN, UTRGV Edinburg Campus

Main Desk Location – Brownsville

The Woods (off campus), 451 E. Alton Gloor, Room 101, Brownsville, TX
ASSIGNED STAFF

Staffing assignments are subject to change as a department’s activities increase or decrease. The three BSC Coordinators will serve as backup for all departments, and the first response if an issue needs to be elevated.

<table>
<thead>
<tr>
<th>Staff</th>
<th>Primary Assignment</th>
<th>Backup Assignment</th>
</tr>
</thead>
<tbody>
<tr>
<td>John Gomez</td>
<td>Office of the President</td>
<td>College of Education and P-16 Integration</td>
</tr>
<tr>
<td></td>
<td>Division of Research, Innovation and Economic Development</td>
<td>College of Fine Arts</td>
</tr>
<tr>
<td></td>
<td>Division of Governmental &amp; Community Relations</td>
<td>College of Liberal Arts</td>
</tr>
<tr>
<td>John Gomez</td>
<td>Division of Finance &amp; Administration</td>
<td>Athletics</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Division of Institutional Advancement</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Media Relations</td>
</tr>
<tr>
<td>John Gomez</td>
<td>Office of the Provost</td>
<td>Office of the VP for Student Success</td>
</tr>
<tr>
<td></td>
<td>Office of the Chief Information Officer</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Office of Vice Provost for Faculty Affairs and Diversity</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Center for Teaching Excellence</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Office of the Deputy Provost</td>
<td></td>
</tr>
<tr>
<td>Irma Rodriguez</td>
<td>College of Education and P-16 Integration</td>
<td>Office of the President</td>
</tr>
<tr>
<td></td>
<td>College of Fine Arts</td>
<td>Division of Research, Innovation and Economic Development</td>
</tr>
<tr>
<td></td>
<td>College of Liberal Arts</td>
<td>Division of Governmental &amp; Community Relations</td>
</tr>
<tr>
<td>Irma Rodriguez</td>
<td>College of Engineering and Computer Science</td>
<td>Division of Operations and Chief of Staff</td>
</tr>
<tr>
<td></td>
<td>College of Business &amp; Entrepreneurship</td>
<td></td>
</tr>
<tr>
<td></td>
<td>College of Sciences</td>
<td></td>
</tr>
<tr>
<td>Irma Rodriguez</td>
<td>Athletics</td>
<td>Division of Finance &amp; Administration</td>
</tr>
<tr>
<td></td>
<td>Division of Institutional Advancement</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Media Relations</td>
<td></td>
</tr>
</tbody>
</table>
BUSINESS SERVICE CENTER FAQ

Frequently Asked Questions (FAQs)

*Is this similar to the Business Service Center from UT Brownsville?*
It’s much different! It’s similar in that there will be a staff devoted to transaction processing, but the way you interact with the BSC at UTRGV will be more personal. First, each department will have assigned representatives in finance support; you will always interact with the same people. This will not be a “queue” system where the first person available assists you. In the event you are not sure who to contact, your representative will be able to guide you to the correct person. We consider this a “concierge level” of service.

*What if my question is fairly simple and generic?*
You can still contact your assigned representatives. Alternatively, there will be central contact points by phone, email, and walk-up window. We also hope to add an instant messaging presence via Lync.

*How is this going to make my life at UTRGV better / easier? Will the Business Service Center simply add another bureaucratic step to our current processes?*
The goal of the BSC is to absorb some of the administrative and operational support activities that take time away from your core responsibilities. Its purpose is not to add bureaucracy, but rather its role is to simplify processes. You will quickly learn the processes for which the BSC is responsible and the ways in which it can assist in troubleshooting without time consuming handoffs from department to department without resolution.

*How is the BSC different from my administrative support?*

UTRGV is proud of our administrative support team. We also ask a lot of them. We ask them to know a little bit about a lot of processes. The BSC is comprised of staff that develop expertise in their functional assignment and for the departments they support. You will still have your administrative support and they will remain critical members of the UTRGV community.

*How will the Business Service Center Director and UTRGV leadership know if the BSC is meeting the high-level of service you are referencing?*

You are going to tell us! In addition to a Director and dotted line reporting relationships to leadership in finance, Procurement, Planning & Analysis, and Accounting, a Governance Committee comprised of staff and leadership from across campus will be charged with creating “Service Level Agreements” with the BSC. These agreements will define the standard of service expected from the BSC including response times, processing times, accuracy of support, and general helpfulness. The Governance Committee will then conduct outreach to the UTRGV community several times per year to request feedback on the BSC’s performance and to subsequently recommend changes to processes.

*Why did UTRGV decide to use a “service center” model?*

Service centers, or shared services, are considered an emerging best practice in higher education that helps improve the quality and consistency of service for operational support provided to faculty and staff. This model is consistent with UTRGV’s vision and its pursuit to be a university built for the 21st century.

*Have other universities implemented service centers?*

Yes. As we mentioned, the concept of service centers and shared services is an emerging best practice in higher education. However, all universities are different, and UTRGV has its own distinct set of needs and challenges. The model we’ve created leverages knowledge from other universities but is also tailored to UTRGV specifically.