**Creighton University Business Service Center**

**Department/School**

**Service Partnership Agreement**

1. **Objective and Goal**

This Service Partnership Agreement (SPA) describes the services provided by the Creighton University Business Service Center and the manner in which they will be provided.

The goal of the Business Service Center is to provide centralized, efficient, value added services to the university with a focus on service, accuracy, and adherence to university policies.

 The objective of this SPA is to establish a mutual understanding of the expectations for the services provided including:

 Communication Model

 Standard services provided

 Roles and responsibilities of the BSC and partner departments

 Performance reporting and review

 Escalation if issues arise

1. **Communication Model**

The Business Service Center is a shared service, operating from 8:00 am to 4:30 pm Monday – Friday on all days the university is open. The general model for communication and method for obtaining services is as follows. A Business Service Center (BSC) Specialist is assigned as the key point of contact for each department. Each department has a shared email address to send requests that is monitored by the assigned BSC specialist and their back-ups. The BSC can also be contacted at 402-280-2920. This number is answered at all times during normal business hours. The specific manner in which to obtain services is listed in the Table under Roles and Responsibilities.

Each month BSC management and staff will conduct user group meetings with key personnel from each school or administrative department. These meetings will focus on process improvement suggestions, questions from the user community and communication of changes from BSC management.

1. **Standard Services**
* Complete CUBuyplus purchase orders submitted by departments as purchase requests
* Complete ‘retrofit’ orders when invoices received not on orders
* Invite suppliers to CUBuyplus and maintain supplier registrations
* Maintain the independent contractors application with DoIT support. Provide training and help desk support for the application.
* CUBuyplus training (Primarily by DoIT), setup and help desk support
* Invoice payment
* Process Travel Expense Reimbursement Requests (TERs)
* Process Travel Advances
* Review Purchasing Card (P-Card) receipts and enter information into the P-Card system (CCOR). This role is known as the custodian of P-cards.
* Purchasing card administration including maintenance of accounts, monitoring the Management Quality Assurance Monitoring Program, and training of cardholders, approvers and custodians
* Partner department special research requests (invoice pulls, receipt pulls etc.)
* Credit applications required by our vendors and new vendors
* Sales Tax Certificates – obtain and maintain certificates required by the states in order for Creighton to have sales tax exemption

**Out of scope services include:**

* Vendor relationship management
* Reporting
* Contract management
1. **Roles and Responsibilities of BSC and Partner**

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| --- | --- | --- | --- | --- |
| **Service** | **BSC Service Commitment** | **Partner Responsibility** | **Service Commitment Reporting/Measuring** | **How to obtain service** |
| CUBuyplus Order | Requisition completed timely – standard TBD | Complete order information submitted including fund/org/accountApprove orders timely | Report through exception – standard reporting TBD | Submit a purchase request through CUBuyplus to the assigned BSC specialist |
| CUBuyplus Retrofit Order | Requisition completed timely- standard TBD | Submit invoices within 5 business days of receipt with complete information including fund/org/account | Report through exception – standard reporting TBD | Submit invoice through intercampus mail addressed to the BSC specialist |
| Custodian P-Card Transaction Review | Review bi-weekly depending on volume and completed 1 day prior to approver due date per the P-Card process documentation | Receipts submitted weekly and no later than 2 days after the cycle closesReceipts submitted with fund/org/account/business purpose etc. | Monthly report for review datePartner receipt exception report for late receipts | Send originals through intercampus mail addressed to BSC Specialist |
| P-Card Approval monitoring | P-Card administrator ensures all transactions properly approved before exporting to Banner | Approvals completed on time according to the P-Card processing schedule | Monthly report for approval date. | Approvers login to the CCOR system at <https://www.commercialcardreports.com> |
| Invoice Payment | Within 45 days of invoice date 95% of time | Submit within 5 days of receipt | Monthly report | Invoice sent directly from vendor to BSC department |
| Travel Expense Request (TER) and Travel Advances | Within 7 days of submitting and for advances prior to request date | Obtain all proper documentation, submit within 7 days of expense occurring. Submit travel advance requests 7 days prior to payment needed | Monthly report | Send to BSC department through intercampus mail |
| **Service** | **BSC Service Commitment** | **Partner Responsibility** | **Service Commitment Reporting/Measuring** | **How to obtain service** |
| Special/Rush Orders | Make every effort to accommodate request and communicate | Communicate clearly rush processing deadline | Limited to less than 5% of total volume, monthly reporting if available | Submit through normal channel noting rush payment |
| Partner Special Research Request | Within 7 days of request | Provide reason for request and clear outline of request | Monitor for excessive requests | Send email to BSC specialist assigned to department |
| CUBuyplus Supplier Registration | Register suppliers within 7 days of request, not including supplier wait time | Provide contact information and escalation assistance as necessary to expedite registration  | TBD | New suppliers should be requested through CUBuyplus home page. Suppliers for retrofits will be initiated when invoice is submitted |
| CUBuyplus Training  | DoIT owns this process, training will be conducted at least quarterly and on as needed basis | NA | NA | Training dates are posted on the Creighton Calendar.  |
| CUBuyplus New User and Approver Setup | Shared Service Sr. Director and DoIT setup new users and approvers | Identify new users promptly and with enough time to ensure proper training is received | NA | Information at: <http://www.creighton.edu/finance/purchasing/cubuyplus/frequentlyaskedquestions/index.php#How_do_I_signup_for_training> |
| **Service** | **BSC Service Commitment** | **Partner Responsibility** | **Service Commitment Reporting/Measuring** | **How to obtain service** |
| P-Card Requests for new cards and credit limit increases | New Accounts: Within 10 business days once training complete and P-Card agreement signed (dependent on First National) Rush requests will be prioritizedCredit limit increases: Within 2 business days once approved by department | Complete training and approvals timely | Quarterly review new card requests and increases and report by exception | New Card: Complete form at <http://www.creighton.edu/finance/purchasing/forms/mastercardpcardagreement/index.php>Change to existing account: Complete form at <http://www.creighton.edu/finance/purchasing/forms/pcardactionrequestform/index.php> |
| P-Card Administration | Complete the actions outlined in the P-Card Monitoring Program which is audited quarterly | Respond to internal audit requests when needed | Internal Audit Quarterly Audit | NA |
| Sales Tax Certificates | Obtain and maintain certificates for states  | 10 days prior to purchase of goods and services or travel | Monitored by exception | Send email to Barb Washington at bjwash@creighton.edu or call extension x2920 |
| Credit Applications | Complete vendor credit application forms | Request as soon as possible to meet payment or order deadlines | Monitored by exception | Send email to Barb Washington at bjwash@creighton.edu or call extension x2920 |

1. **Performance Reporting and Review**

Performance metrics will be posted online at (TBD)

Annually BSC Management will meet with the Dean, key personnel and the Shared Services Director to review commitment measurements, set target goals and amend the SPA as necessary.

1. **Escalation when service commitments are not being met**

The Partner and the BSC will collaborate in good faith to achieve and maintain a positive working relationship. Problems and issues should be first addressed with the BSC specialist or Accounts Payable Specialist. If an issue cannot be resolved, problems, performance issues and special circumstances should be quickly reported to the BSC manager who will work to quickly resolve, identify root causes and prevent future problems. Likewise, if the BSC has a problem with a partner the individual will be contacted first and if necessary will engage help from the departments finance liaison.

1. **Agreement Term**

This agreement is in effect from Month Day, Year and ends Month Day, Year (annual)

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School/Division Leader Date

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Shared Services Director Date

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Business Service Center Manager Date

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Financial Liaison Date