

# SHARED ENVIRONMENT PARTNERSHIP AGREEMENT

## Between Fiscal & Audit Services and UW Bothell Units

Updated: February 2024

This Shared Environment Partnership Agreement (PA) includes the scope of services and expectations to promote an efficient and supportive working relationship between Fiscal & Audit Services (FAS) and UW Bothell units.

### I. Fiscal & Audit Services Shared Environment Business Processes

1. Accounts Receivable
2. Equipment Insurance
3. Equipment Inventory
4. Food Approvals
5. Miscellaneous Payments (formerly eReimbursements, Non-UW Travel, and Payments to Individuals)
6. Procurement
7. Procurement Card (Procard)
8. Travel and Central Travel Account (CTA)

### II. Service Responsibilities

The FAS Shared Environment (FAS SE) and UW Bothell academic/administrative unit (unit) agree to promote and support a collaborative partnership by following these fundamental responsibilities:

Responsibilities of the FAS SE	Responsibilities of Units
<ul style="list-style-type: none"><li>• Provide appropriate staffing and oversight to ensure a best practices approach in providing services at agreed upon service levels.</li></ul>	<ul style="list-style-type: none"><li>• Name a unit Point Person to engage with the FAS SE. Embrace best practices. (There may be multiple Point Persons for a single unit.)</li></ul>
<ul style="list-style-type: none"><li>• Develop clear, efficient processes which comply with policies and procedures.</li></ul>	<ul style="list-style-type: none"><li>• Follow FAS SE processes and procedures; consult with FAS on compliance questions and best practices.</li></ul>
<ul style="list-style-type: none"><li>• Complete service requests within five business days of receipt if there are no follow-up questions or Workday system issues.</li></ul>	<ul style="list-style-type: none"><li>• Partner with FAS SE staff to meet FAS' five-business day goal by providing complete documentation and information, as well as reviewing and approving transactions timely. Inform FAS of difficulties with meeting the goal.</li></ul>

<ul style="list-style-type: none"> <li>• Communicate with units about information or changes pertaining to FAS SE procedures.</li> </ul>	<ul style="list-style-type: none"> <li>• Help disseminate information within the unit to promote the use of FAS SE procedures.</li> </ul>
<ul style="list-style-type: none"> <li>• Provide training to units as needed for new procedures.</li> </ul>	<ul style="list-style-type: none"> <li>• Communicate and train locally on procedures. As needed, consult FAS SE staff with questions.</li> </ul>
<ul style="list-style-type: none"> <li>• Be responsive to suggestions to improve effectiveness or efficiency.</li> </ul>	<ul style="list-style-type: none"> <li>• Communicate clearly and keep the FAS SE fully informed.</li> </ul>
<ul style="list-style-type: none"> <li>• Units will be contacted if an issue is identified with a transaction. Follow-up will continue until the problem is resolved.</li> </ul>	<ul style="list-style-type: none"> <li>• Make good faith effort to resolve issues directly with FAS SE staff and/or appropriate supervisor.</li> </ul>

### III. Role of the Unit Point Person

The unit Point Person is the liaison between the unit staff/faculty/students and the FAS SE for a particular business process. (There may be more than one Point Person for a single unit.)

The Unit Point Person:

- Is the liaison between the unit and the FAS SE on behalf of *all* unit staff, faculty, and students (unit staff, faculty and students do not contact FAS directly).
- Is the subject matter expert within the unit: Maintains an in-depth knowledge of university-wide and UW Bothell-specific policies and procedures; stays current with policy developments through trainings, website updates, Point Person meetings, etc.
- Assists their unit employees with fiscal compliance and Workday submissions.
- Attends regular Point Person meetings led by the FAS SE to learn about business process updates, share experiences, and collaborate. The meeting frequency may change over time.

### IV. Role of the FAS SE Staff

The FAS SE is the liaison between the unit Point Person and UW Seattle Central Finance Offices.

The FAS SE:

- Is a business process subject matter expert.
- Processes transaction requests within five business days of receipt if there are no follow-up questions or Workday system issues.
- Communicates with and supports the Point Person.
- Reviews Workday submissions for compliance with UW policies and UW Bothell-specific policies, and ensures documentation is valid and complete before approval.
- Escalates complex matters on behalf of the unit to UW Seattle Central Finance Offices. (Note: This is a UWFT Program decision/directive.)
- Leads regular Point Person meetings to provide business process updates, training, and support. The meeting frequency may change over time.

## V. Feedback and Escalation

### Feedback

The FAS SE is committed to understanding unit needs and welcomes all feedback.

### Escalation Process

FAS staff and Point Persons will make a good faith effort to resolve issues directly with one another.

In cases where a matter may need to be escalated for resolution:

- Units can contact Becky Collord (Associate Director) at [bcollord@uw.edu](mailto:bcollord@uw.edu), or Kendra Yoshimoto (Senior Director) at [kyoshi@uw.edu](mailto:kyoshi@uw.edu).
- FAS will contact an appropriate person within the unit, such as the administrator or director.