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:

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<tr>
<th>Responsibilities of the FAS SE</th>
<th>Responsibilities of Units</th>
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<tr>
<td>• Provide appropriate staffing and oversight to ensure a best practices approach in providing services at agreed upon service levels.</td>
<td>• Name a unit Point Person to engage with the FAS SE. Embrace best practices. (There may be multiple Point Persons for a single unit.)</td>
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<td>• Develop clear, efficient processes which comply with policies and procedures.</td>
<td>• Follow FAS SE processes and procedures; consult with FAS on compliance questions and best practices.</td>
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<td>• Complete service requests within five business days of receipt if there are no follow-up questions or Workday system issues.</td>
<td>• 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.</td>
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<td><strong>Communicate with units about information or changes pertaining to FAS SE procedures.</strong></td>
<td><strong>Help disseminate information within the unit to promote the use of FAS SE procedures.</strong></td>
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<td><strong>Provide training to units as needed for new procedures.</strong></td>
<td><strong>Communicate and train locally on procedures. As needed, consult FAS SE staff with questions.</strong></td>
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<td><strong>Be responsive to suggestions to improve effectiveness or efficiency.</strong></td>
<td><strong>Communicate clearly and keep the FAS SE fully informed.</strong></td>
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<td><strong>Units will be contacted if an issue is identified with a transaction. Follow-up will continue until the problem is resolved.</strong></td>
<td><strong>Make good faith effort to resolve issues directly with FAS SE staff and/or appropriate supervisor.</strong></td>
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### 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, or Kendra Yoshimoto (Senior Director) at kyoshi@uw.edu.
- FAS will contact an appropriate person within the unit, such as the administrator or director.