



**HSC Finance & Administration  
Shared Services**



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## HSC Finance and Administration Office

### List of Services

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- HR/Payroll
  - Recruitment and hiring process \$
  - Staff onboarding
  - Training (time entry & approval; Banner systems; EPAFs/EPANs; Adobe Sign; PRs/POs)
  - Employee relations
  - Performance management
  - Discharges
  - Reclassifications
  - Retention offers/Counter offers
  - Payroll and adjustments
  - Performance evaluations (guidance)
  - Extended leave (FML, Parental, LWOP, Military) \$
  - Organization/staff review and recommendations; operations \$
  - Organizational charts (constructing)
  
- Staff Support
  - Calendar management
  - Meeting coordination and scheduling
  - Purchasing/P-Card
  - Travel coordination and payment processing
  - Tracking of annual mandatory trainings; provide reports to managers
  - Create and edit professional documents
  
- Other
  - Event planning and coordination
  - Smartsheet design and build \$
  - Research and analysis of complex issues
  - Coordinate annual flu immunization documentation
  - Web design and build \$
  - HSC Wellness presentations
  - Equipment inventory

\$ Additional fees for services may apply

Contact HSC Finance & Administration Office



## HSC Unrestricted Accounting Office List of Services

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- Chrome River Expenses and Invoices review and approval \$
- Purchase requisitions create, review and approval \$
- Workflow items such as BAR approvals and Department Scholarships \$
- Journal Vouchers, batch summaries and FUPLOADs create review and approval
- NSAR process for invoicing, credits, aging schedules, collection letters, bad debt reserve allowance
- Internal Service Centers Monitoring, criteria and training \$
- UNM Chart of Accounts approvals
- Non-Standard Payment forms (payroll)
- P-Card exceptions
- Policies and guidelines interpretations and education/training \$
- Year-end close process
- Intercompany reconciliations and elimination schedules
- Financial statements and funds reviews
- NSAR and other reconciliations
- MyReports ad hoc queries \$
- Index reconciliations \$
- Banner specific training on Banner forms, navigation, application use
- Training for new accountants or staff on websites, resources, policies/guidelines, Chart of Accounts, FOIA \$

\$ Additional fees for services may apply

[Contact HSC Unrestricted Accounting Office](#)



## HSC Sponsored Projects Office List of Services

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- Proposal, Progress Report, Just-in-Time Requests review/approval/submission – includes providing guidance and answering questions regarding proposal preparation and budget.
- Contract/Amendment review/development/negotiation/advisement/execution – includes obtaining internal approvals and budget reviews
- Outgoing Subaward review/development/negotiation/advisement/execution(includes budget) \$
- Ancillary review/negotiation/advisement/execution (MTA, CDA, Teaming, Data Share, Licensing, MOU) \$ - includes guidance on questionnaires
- Collects/reviews/obtain approvals for F&A Splits, F&A Waivers, Cost Share Commitments, Export Control, Request to Spend Funds, PI Effort Waiver, and other internal forms. Submit for signature on behalf of departments \$
- Prepare award in Click ERA, ensuring internal compliance approved, transfer to C&GA for account set-up in Banner
- Early Termination & No-cost Extension review/advise/submit/process
- Relinquishment & PI Transfer Requests review/advise/process
- C&GA Assistance - when necessary with submission of requests if authorized official required to submit, interpret contract/grant guidelines for collection on invoices
- Scope of Work Change Requests (i.e. addition of subcontract, level of effort) reviews/provides guidance/counter-signs/submit to Sponsor for approval – processes approval once received.
- Proposal Correspondence review/advises/submit as designated Authorized Officials
- Adhoc/Quarterly Reporting provided to departments \$
- Training – develops/presents/mentors HSC Department Staff on various topics \$
- Provide advisement on various topics, answer questions, obtain institutional signatures, serve as liaison between departments & sponsors

\$ Additional fees for services may apply

Contact HSC Sponsored Projects Office



## HSC Contract & Grant Accounting Office List of Services

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- Set-up restricted awards – includes requesting Index and submitting to Department
- Monitor restricted accounts
- Collect ABS for award and cost share
- Enter Banner Fund Number in Click
- Billing/cost recovery to include obtaining second year PO's on state contracts
- Assist HSC Departments with budget revision requests, sign, and send to sponsor if necessary
- Updates PIs in Banner and sets up indexes as necessary
- Assist HSC Departments with carryforward requests, sign, and send to sponsor if necessary
- Prepare financial reports and answer any sponsor questions related to financial reports
- Close-out awards
- Set-up and monitoring of RTSFs
- Verify estimated unobligated balance on progress reports as requested by HSC Departments and/or SPO
- Handles invoicing issues via communication with department and sponsor with advisement from SPO, as necessary
- MyReports ad hoc queries assistance and training \$
- Grant/Award reconciliations assistance and training \$
- Banner specific training on Banner forms, navigation, application use
- Policies and guidelines interpretations and education/training \$
- Training for new accountants or staff on websites, resources policies/guidelines, allowable costs, sponsored project requirements \$

\$ Additional fees for services may apply

[Contact HSC Contract & Grant Accounting Office](#)



## HSC Budget Office List of Services

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- Answer questions/provide explanations on Budget JVs
- Provide training and answer questions on Budget and Salary Planner
- Provide guidance and assistance with 1st quarter and mid-year budget review preparation
- Provide training and answer questions on Projection System
- Answer questions/provide explanations regarding 1901/1903 account code activity and/or adjustment entries
- Provide training and answer questions on Categorization of Reserves
- Answer questions/provide explanations on rules regarding Transfer and Allocation entries
- Provide guidance on Transfer to Plant Fund transactions and required approvals
- Provide MyReports overview for budget reports
- Provide general reporting and analytics support
- Provide budgets and general information on tuition
- Answer questions/help address NSF issues
- Serve on interview panels for Accounting/Finance Positions

§ Additional fees for services may apply

[Contact HSC Budget Office](#)



## HSC Facilities Office List of Services

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- Answer questions/provide explanations on facilities related issues/projects
- Reviews projects for constructability, code compliance, and completeness of documentation, according to phase objectives; inspects construction to monitor progress and ensure conformance to plans and specifications
- Project management of programming, design and construction activities on HSC campus
- Capital planning management and document preparation for state entities such as HED, LFC, DOF and the regents
- Manage HSC space requests
- Plan reviews for furniture modifications
- Provide guidance on HSC facilities standards
- Advise and manage, with purchasing, the best way to procure programming, design and construction professionals as it relates to each project
- Approves and negotiates pay requests/change orders from consultants, contractors and vendors
- Maintains project files, tracks schedule and manages project budgets

💰 Additional fees for services may apply

[Contact HSC Facilities Office](#)





## Agreement/MOU

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**To:** <Department>  
**From:** <Shared Services Area> (SSA)  
**Subject:** <Department> and <SSA>  
**Date:** <Date>

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This MOA is to finalize the agreement between the <Department> and the <SSA>. The <SSA> will assign a team member from <SSA> who will be the main point of contact, and who is responsible for processing and overseeing the completion of agreed upon duties and responsibilities, and which are summarized in the attached matrix detailed as **Attachment A**.

Note, the <SSA> acts only as an advisor regarding and processor of transactional processes and does not make managerial decisions, nor responsible for the decisions made by the leadership within <Department>. The ultimate responsibility resides within the <Department's> leadership team. <Department> leadership should continue to seek advice regarding <type> actions that are outside of the scope of this agreement.

### Continuation of Shared Services

The <SSA> agrees to perform all of the services outlined in this agreement and referenced attachments provided it remains fiscally possible within the Division. This agreement will be in effect from <xxx> through <xxx>. The annual/monthly/quarterly/one-time service fee for the <SSA> is <\$XXX> (pro-rated if necessary based on the effective dates of this agreement).

If there is not adequate funding to maintain this model, then <SSA> will consult with <Department> to determine a viable solution or provide an alternative approach. Changes to the financial obligations of this agreement must be approved by <Approver>. Such discussions will occur no later than 60 days prior to any changes to the services previously provide. Prior to the end of the agreement, <Department> and <SSA> will meet to review the services being provided and determine whether modifications to the scope of this agreement are necessary.

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XXX, Department Rep

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XXX, <Area> Shared Services Rep



## List of Services/Fees

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### **Services for Fee to charge under different methodologies (any combination)**

- Fixed price billing – *fixed price quote can be provided to department per project*
- Hourly billing – *established hourly billing rates may be charged per hour of service performed*
- FTE allocation - *% of employee's distribution may be billed for set time frame*

§ - Any service may be viewed as a “Fee Service” if effort is deemed *Time Intensive*.

### **HSC Finance and Administration Office - List of Services for Fee**

- Recruitment and hiring process
- Extended leave (FML, Parental, LWOP, Military)
- Organization/staff review and recommendations; operations
- Smartsheet and Web design and build

### **HSC Unrestricted Accounting Office - List of Services for Fee**

- Chrome River Expenses and Invoices review and approval
- Purchase requisitions create, review and approval
- Workflow items such as BAR approvals and Department Scholarships
- Internal Service Centers Monitoring, criteria and training
- Training for new accountants or staff on websites, resources, policies/guidelines, etc.

### **HSC Sponsored Projects Office - List of Services for Fee**

- Outgoing Subaward review/development/negotiation/advisement/execution(includes budget) §
- Ancillary review/negotiation/advisement/execution (MTA, CDA, Teaming, Data Share, Licensing, MOU) - includes guidance on questionnaires
- Collects/reviews/obtain approvals for F&A Splits, F&A Waivers, Cost Share Commitments, Export Control, Request to Spend Funds, PI Effort Waiver, and other internal forms. Submit for signature on behalf of departments
- Adhoc/Quarterly Reporting provided to departments
- Training – develops/presents/mentors HSC Department Staff on various topics

### **HSC Contracts and Grant Accounting Office - List of Services for Fee**

- Grant/Award reconciliations assistance and training
- Policies and guidelines interpretations and education/training
- Training for new accountants or staff on websites, resources policies/guidelines, allowable costs, sponsored project requirements
- MyReports ad hoc queries assistance and training

## Most Commonly Used Services

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- Answer questions/provide explanations on facilities related issues/projects – [HSC FACILITIES](#)
- Project management of programming, design and construction activities on HSC campus – [HSC FACILITIES](#)
- Answer questions/provide explanations on Budget Process – [HSC BUDGET](#)
- Provide general reporting and analytics support – [HSC BUDGET](#)
- Monitor restricted accounts – [C&G ACCOUNTING](#)
- Assist HSC Departments with Restricted budget revision requests, sign, and send to sponsor if necessary – [C&G ACCOUNTING](#)
- Proposal, Progress Report, Just-in-Time Requests review/approval/submission – includes providing guidance and answering questions regarding proposal preparation and budget. – [HSC SPONSORED PROJECTS](#)
- Contract/Amendment review/development/negotiation/advisement/execution – includes obtaining internal approvals and budget reviews – [HSC SPONSORED PROJECTS](#)
- Journal Vouchers, batch summaries and FUPLOADs create review and approval - [UNRESTRICTED ACCOUNTING](#)
- Policies and guidelines interpretations and education/training - [UNRESTRICTED ACCOUNTING](#)
- Staff recruitment and hiring process – [HSC FINANCE AND ADMIN OFFICE](#)
- Performance Management – [HSC FINANCE AND ADMIN OFFICE](#)