



## Customer Service Management

### Submitting Requests through the ServiceNow Portal

Business Affairs Service Center

June 2022

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# What is ServiceNow CSM?

ServiceNow Customer Service Management (CSM) is a cloud-based workflow automation platform that streamlines communication and creates transparency between the Business Service Center and Departments.

Departments will submit requests to the Business Affairs Service Center through the ServiceNow Portal by completing the applicable form and attaching all required supporting documentation. Upon submission, a BSC Specialist will create a case and communicate all updates through the open case in the Service Now Portal. When the request is successfully completed, the BSC Specialist will propose a solution, and when accepted, the service request case will be closed. When the case is closed, no further action can be taken. In circumstances where a closed case would need further action, a new service request will need to be submitted.

*Note: Prior to ServiceNow, the Business Affairs Service Center utilized intake forms via MS Forms located in SharePoint. ServiceNow will replace those forms.*

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## Accessing the ServiceNow Portal

To access the request forms in the ServiceNow Business Service Center Portal, visit the following website: <https://utsa.service-now.com/bsc> and log in using your UTSA credentials (abc123).

ServiceNow can also be accessed through the [BA BSC website](#) under the ServiceNow tile.

The screenshot shows the ServiceNow Business Service Center Portal. At the top, there is a dark blue header with the UTSA logo and text 'The University of Texas at San Antonio'. To the right of the logo are several utility links: 'UTSA Home', 'myUTSA', 'UTSA Today', 'Maps', 'Directory', and 'Enterprise Services'. Below these are three buttons: 'Apply', 'Visit', and 'Request Information'. A 'LOG IN' button is circled in red in the top right corner. Below the header, there are three navigation links: 'SERVICE CATALOG', 'KNOWLEDGE BASE', and 'MY CASES'. The main content area has a large blue and orange wave graphic. Below the graphic, the text 'Welcome to the Business Service Center' is displayed. Underneath is a search bar with the text 'Search' and a magnifying glass icon. Below the search bar are three dark blue tiles with orange icons: 'BSC FINANCIAL FORMS' (with a dollar sign icon), 'BSC HR FORMS' (with a group of people icon), and 'KNOWLEDGE BASE' (with a book icon). At the bottom, there are three white boxes with dark blue headers: 'POPULAR SERVICES', 'MY OPEN CASES' (with 'No Records Found' below it), and 'POPULAR KNOWLEDGE ARTICLES' (with 'No content to display' below it).

## Portal Homepage:

The screenshot shows the Business Service Center portal homepage. At the top, the UTSA logo and name are on the left, and navigation links like 'UTSA Home', 'myUTSA', 'UTSA Today', 'Maps', 'Directory', and 'Enterprise Services' are on the right. Below this, a navigation bar contains 'SERVICE CATALOG', 'KNOWLEDGE BASE', and 'MY CASES' (circled with a red 6). A user profile for 'KRYSTLE NAVIN' is visible on the right. The main heading is 'Welcome to the Business Service Center'. Below it is a search bar (circled with a red 4) and three main service buttons: 'BSC FINANCIAL FORMS' (circled with a red 1), 'BSC HR FORMS' (circled with a red 2), and 'KNOWLEDGE BASE' (circled with a red 3). At the bottom, there are three sections: 'POPULAR SERVICES' with a link for 'Expense Reimbursement - Non Travel', 'MY OPEN CASES' (circled with a red 5) showing 'No Records Found', and 'POPULAR KNOWLEDGE ARTICLES' showing 'No content to display'.

<sup>1</sup>**BSC Financial Forms:** Requests which are financial in nature, such as expense reimbursements, travel authorizations, invoice payments, business contracts, and procurement requests.

<sup>2</sup>**BSC HR Forms:** Requests which relate to Human Resource functions and processed through an eForm, such as new/rehires, terminations, transfers, supplemental pays, position funding changes, etc.

<sup>3</sup>**Knowledge Base:** *COMING SOON* – Reference guides and resources.

<sup>4</sup>**Search:** Search for Knowledge Articles and Forms using key words.

<sup>5</sup>**My Open Cases:** Current open cases that you’ve submitted. Only 5 cases will appear at a given time. To view all cases (open, awaiting info, closed), select “My Cases” from the top navigation bar.

<sup>6</sup>**My Cases:** All service requests you’ve submitted (open, awaiting info, closed).

## General Info

As information is provided, each request form will generate additional fields as required.

Required fields are marked with a red asterisk.

Required information is listed in red below the Submit button.

Note: the form will not submit unless all required information is entered.

Include as much information as possible to avoid processing delays.

Upload fields will appear when an attachment is required to proceed. To attach additional supporting documents, use the “Add Attachments” button, located at the bottom of the form.

Business Service Center: The Business Service Center will auto-generate on each form based on the information entered in the ‘Requested For’ field. Only the service center marked on the form can view and process the request. Verify **VPBA** is selected to ensure the Business Affairs Service Center will receive your request.

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## Financial Forms

The forms listed under the Financial section of ServiceNow are as follows:

**Business Contract Request** – submit agreements for signature and Statements of Work (SOWs) for processing.

**Expense Reimbursement – Non-Travel** – for reimbursing business expenses not related to travel. Mileage/parking reimbursements not related to a trip can be submitted on this form as well.  
*Note – taxes cannot be reimbursed.*

**Expense Reimbursement – Travel** – for reimbursing travel expenses associated with a travel authorization. Complete for all trips, even for those at no cost to UTSA. Must be submitted within 30 days of return from travel.

**Invoice Payment Request** – submit invoices and OneCard statements for payment to be paid either by Purchase Order or Non-PO Voucher.

**Participant Advance** – Request an advance to pay research subjects or other participants in an approved project. Must be submitted at least 10 business days prior to the project’s human study start date.

**Procurement Request** – request procurement of items or services through the following methods of purchase: Purchase Order, University Card, Non-PO voucher, Interdepartmental Transfer (IDT), or Purchase Order Change (POC)

**Travel Authorization** – used for authorizing travel for staff and students on behalf of UTSA. Must be submitted and fully approved prior to making travel arrangements.

## Business Contract Request

Submit agreements for signature and Statements of Work (SOWs) for processing.

### Business Contract Request

Business Contract Request

For Service Agreements, Participant Agreements, and Speaker Agreements. If the agreement is \$15K or more please submit as a purchase order request [insert link to procurement request form]

*Requested For (First, Last Name)	Employee ID
<input type="text" value="Krystle N"/>	<input type="text"/>
Department	*Business Service Center
<input type="text"/>	<input type="text"/>
*Type of Contact	
<input type="text" value="Participant Agreement"/>	
*Do you have a completed agreement or statement of work?	
<input type="text" value="-- None --"/>	
Is this an international vendor?	
<input type="text" value="-- None --"/>	
Notes to BSC	
<input type="text"/>	

 Add attachments

Submit

Required information

- Business Service Center
- Do you have a completed agreement or statement of work?

**Requested For (First, Last Name):** Search for the name the request is for. This will default to the user submitting the request. For admins submitting on behalf of a department head, enter the department manager's information if they will be managing their cases in ServiceNow. Otherwise, list in the comments and they will be added to the watch list to receive notification when a comment is added to the case.

*Employee ID, Department and Business Service Center will auto-generate based on Requested For.*

**Business Service Center:** Verify VPBA is selected.

**Type of Contract:** Select from the following:

Participant Agreement – when an individual will join in a short-term collaboration or event such as a panel discussion, a lecture (to get their feedback), research discussions, or conference participation

Service Agreement – when services will be provided by an individual, company, or organization

Speaker Agreement – when an individual will be providing a presentation or lecture for a limited duration or short engagement (typically no more than 2-3 days) with UTSA-controlled access to students, faculty, and staff

Other - Select when agreement does not fit into any of the above listed categories.

**Do you have a completed agreement or statement of work?:**

**If yes:** Upload the agreement or statement of work.

**If no:** Enter all applicable information for the contract.

**Contracting Party Name:** Name of the vendor.

**Contracting Party Address:** Vendor's address.

**Contracting Party Email:** Vendor's email.

**Contracting Party Phone Number:** Vendor's phone number.

**Description of Contract Request:** Enter the business purpose of the contract (the "why" behind the need for the contract and how it relates to the University). *Note: all acronyms must be spelled out.*

**Amount for Compensation:** Total/maximum amount to be paid.

**Amount for Travel Expenses:** Estimated amount for travel associated with contract.

**Term Start Date:** The date the contract goes into effect.

**Term End Date:** The date the contract expired.

**Cost Center/Project ID(s):** Funding source for the contract.

**Is this an international vendor:** International vendors require additional review/approvals.

**Notes to BSC:** Enter any additional information the BSC will need to process your request.

**Attachments:** Attach all supporting documentation (contract, approvals, quotes, etc.)

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## Expense Reimbursement – Non-Travel

For reimbursing business expenses not related to travel. Mileage/parking reimbursements not related to a trip can be submitted on this form as well. *Note: taxes cannot be reimbursed.*

### Expense Reimbursement - Non Travel

Please complete this form for any non-travel expense reimbursement. Note - taxes cannot be reimbursed

\*Requested For (First, Last Name)  x v Employee ID

Department  v \*Business Service Center  x v

\*Is this Hospitality or Entertainment?  v

\*Please provide a justification for the expense

Receipts  
Please attach all receipts at the bottom of the form. If you are missing receipts please fill out the Declaration of Missing Evidence form and use the attachment option at the end of the form. <https://www.utsa.edu/financialaffairs/resources/forms/009.html>

\* Cost Center/Project ID(s)

Actions	Cost Center/Project ID	Amount
No data to display		

Attach department chair or cost center manager approval (Not required for Project ID's) ?

You can attach an email, award letter, etc. x

Submit

Required information

- Is this Hospitality or Entertainment?
- Please provide a justification for the expense
- Cost Center/Project ID(s)

**Requested For (First, Last Name):** Search for the name the request is for. This will default to the user submitting the request. For admins submitting on behalf of a department head, enter the department manager's information if they will be managing their cases in ServiceNow. Otherwise, list in the comments and they will be added to the watch list to receive notification when a comment is added to the case.

*Employee ID, Department and Business Service Center will auto-generate based on Requested For.*

**Business Service Center:** Verify VPBA is selected.

**Is this Hospitality or Entertainment?:** If Yes, attach the signed BEF.

**Please provide a justification for the expense:** Provide a detailed purpose of the expense and how it relates to the university.

**Cost Center/Project ID(s):** Funding source for the expense reimbursement.

**Attach department chair or cost center manager approval** (Not required for Project ID's)

**Notes to BSC:** Enter any additional information the BSC will need to process your request.

**Attachments:** Attach all receipts for reimbursement and (if applicable) BEF and approvals. If you are missing receipts, the [Declaration of Missing Evidence form](#) is required as supporting documentation.

## Expense Reimbursement – Travel

For reimbursing travel expenses associated with a travel authorization. Complete for all trips, even for those at no cost to UTSA.

Submit [travel reimbursements](#) **within 30 days of return** from travel to avoid [IRS tax implications](#).

### Expense Reimbursement - Travel

Please complete for each employee (faculty, staff or student) after authorized work travel (even those at no cost to university).

*Requested For (First, Last Name)	Employee ID
<input type="text" value="Krystle Navin"/>	<input type="text" value="6001591009"/>
Department	*Business Service Center
<input type="text" value="VPBA BUSINESS SERVICE CENTER"/>	<input type="text" value="VPBA"/>
*Do you have a Travel Authorization number?	
<input type="text" value="-- None --"/>	
*Travel Authorization Number	<input type="text"/>
*Travel Destination	<input type="text"/>
*Departure Date	<input type="text"/>
*Return Date	<input type="text"/>
*Is any portion of this trip paid by UTSA?	<input type="text" value="-- None --"/>
Notes to BSC	<input type="text"/>

Required information

- Do you have a Travel Authorization number?
- Travel Authorization Number
- Travel Destination
- Departure Date
- Return Date
- Is any portion of this trip paid by UTSA?

**Requested For (First, Last Name):** Search for the name the request is for. This will default to the user submitting the request. For admins submitting on behalf of a department head, enter the department manager’s information if they will be managing their cases in ServiceNow. Otherwise, list in the comments and they will be added to the watch list to receive notification when a comment is added to the case.

*Employee ID, Department and Business Service Center will auto-generate based on Requested For.*

**Business Service Center:** Verify VPBA is selected.

**Do you have a Travel Authorization number?:**

If Yes, enter Travel Authorization Number.

If No: Complete and attach the [Travel Authorization form](#)

**Travel Authorization Number:** Refer to the comments of your submitted Travel Authorization Request case in ServiceNow.

**Travel Destination:** The city and state traveling to.

**Departure Date:** Date trip began (when the traveler departed the official workstation location).

**Return Date:** Date trip ended (when the traveler returned back to the official workstation location).

**Is any portion of this trip paid by UTSA?:** If Yes, attach receipts.

**Please list any expenses paid with a University Credit Card:** Includes all expenses paid through OneCard, Concur, and university travel agencies (airfare, lodging, registrations, etc.)

**Please list any other expenses to be reimbursed:** List the type of expense and amount.

*Note:* For mileage, list the total amount of miles to be reimbursed.

**Cost Center/Project ID(s):** Funding source for the travel expenses.

**Notes to BSC:** Enter any additional information the BSC will need to process your request.

**Please include the ServiceNow case number of the travel authorization request.**

**This will allow the BSC to link the travel authorization to the expense reimbursement request.**

**Attachments:** Attach all receipts (regardless of how the expense was paid) and supporting documentation (approvals, conference/meeting agenda, BEF (if applicable), mileage/parking logs, etc.)

Missing receipts require the [Declaration of Missing Evidence form](#) for supporting documentation.

When submitting receipts, the following checklist can be utilized to ensure all receipts have been accounted for:

- |   |  |
|---|--|
| <input type="checkbox"/> Airfare                                    | <input type="checkbox"/> Registration              |
| <input type="checkbox"/> Hotel                                      | <input type="checkbox"/> Incidentals               |
| <input type="checkbox"/> Car Rental                                 | <input type="checkbox"/> Conference/meeting agenda |
| <input type="checkbox"/> Per Diem                                   | <input type="checkbox"/> BEF                       |
| <input type="checkbox"/> Transportation (train, subway, taxi, etc.) | <input type="checkbox"/> Approvals                 |
| <input type="checkbox"/> Parking                                    | <input type="checkbox"/> Other                     |
| <input type="checkbox"/> Mileage / MapQuest                         |  |

If you did not incur any receipts from the trip, please notify your Specialist by adding a comment on the Travel Authorization Request case in the ServiceNow portal, as you may be eligible to receive per diem.

## Invoice Payment Request

Submit invoices and OneCard statements for payment to be paid either by PO or Non-PO Voucher.

### Invoice Payment Request

Invoice Payment Request

Details for vendor payment guidelines can be found here. <https://www.utsa.edu/financialaffairs/services/disbursements-travel/disbursements/vendor-payments.html>

* Requested For (First, Last Name)	Employee ID
<input type="text" value="Krystle Navin"/>	<input type="text" value="6001591009"/>
Department	* Business Service Center
<input type="text" value="VPBA BUSINESS SERVICE CENTER"/>	<input type="text" value="VPBA"/>

If invoice is associated with a UTSA Purchase Order, indicate PO number:

Is this invoice associated with an approved business contract

Example: Service Agreement, Speaker Agreement, etc.

Notes to BSC

Add attachments

**Requested For (First, Last Name):** Search for the name the request is for. This will default to the user submitting the request. For admins submitting on behalf of a department head, enter the department manager's information if they will be managing their cases in ServiceNow. Otherwise, list in the comments and they will be added to the watch list to receive notification when a comment is added to the case.

*Employee ID, Department and Business Service Center will auto-generate based on Requested For.*

**Business Service Center:** Verify VPBA is selected.

**If invoice is associated with a UTSA Purchase Order, indicate PO number:** Purchase Order number is required for correct payment processing.

**Is this invoice associated with an approved business contract:**

**If Yes:** Attach the business contract, invoice, and/or BEF using the attachments field.

**If No:** Enter the vendor information.

**Vendor Name:** Name of company to be paid.

**Amount to be paid:** Total amount due.

**Attach invoice**

**Cost Center/Project ID(s):** Funding source for invoice payment.

**Notes to BSC:** Enter any additional information the BSC will need to process your request.

**Attachments:** Attach all supporting documentation (invoices, OneCard statements, BEF, etc.)

## Participant Advance

Request an advance to pay research subjects or other participants in an approved project. Must be submitted at least 10 business days prior to the project's human study start date.

### Participant Advance

Participant Advance

Request an advance to pay research subjects or other participants in an approved project. Approved IRB must be attached. This form must be submitted at least 10 business days prior to the project's human study start date.

\*Requested For (First, Last Name)  \*

Employee ID

Department

\*Business Service Center  \*

\*Cost Center/Project ID(s)

Actions	Cost Center/Project ID	Amount
No data to display		

\*Type of Expense

\*Total Amount

Provide the IRB number

\*Attach IRB form

If IRB form is not available. Please attach the email exemption: <http://research.utsa.edu/research-funding/human-subjects/>

Required information

- 
-

**Requested For (First, Last Name):** Search for the name the request is for. This will default to the user submitting the request. For admins submitting on behalf of a department head, enter the department manager's information if they will be managing their cases in ServiceNow. Otherwise, list in the comments and they will be added to the watch list to receive notification when a comment is added to the case.

*Employee ID, Department and Business Service Center will auto-generate based on Requested For.*

**Business Service Center:** Verify VPBA is selected.

**Cost Center/Project ID(s):** Funding source for the participant advance payment.

**Type of Expense:** Select how the advance will be paid, either Non-PO Voucher to PI or Gift Cards to Participants.

**Total Amount:** Amount to be paid to the participant(s).

**Provide the IRB number:** Number provided by the UTSA Institutional Review Board.

**Attach IRB form:** If IRB form is not available, please attach the [email exemption](#).

## Procurement Request

Request procurement of items or services through the following methods of purchase: Purchase Order, University Card, Non-PO voucher, Interdepartmental Transfer (IDT), or Purchase Order Change (POC).

Procurement Request

Procurement Request

The Procurement Request form is to request procurement items or services. Check Vendor Hold status before submitting [https://fmcpa.cpa.state.tx.us/tpis/search.html]

\*Requested For (First, Last Name) Employee ID  
Krystle Navin 6001591009

Department \*Business Service Center  
VPBA BUSINESS SERVICE CENTER VPBA

\*Requested Method of Purchase  
-- None --

Reason for purchase

\*Does this purchase require delivery?  
-- None --

\*Is this a new vendor?  
-- None --

\*Is this an international vendor?  
-- None --

\*Vendor Name

Vendor Point of Contact

Vendor Email

Submit

Required information

- Requested Method of Purchase
- Does this purchase require delivery?
- Is this a new vendor? Is this an international vendor?
- Vendor Name Cost Center/Project ID(s)
- Product Name/Description Total Cost

**Requested For (First, Last Name):** Search for the name the request is for. This will default to the user submitting the request. For admins submitting on behalf of a department head, enter the department manager's information if they will be managing their cases in ServiceNow. Otherwise, list in the

comments and they will be added to the watch list to receive notification when a comment is added to the case.

*Employee ID, Department and Business Service Center will auto-generate based on Requested For.*

**Business Service Center:** Verify VPBA is selected.

**Requested Method of Purchase:** *If unknown, select Purchase Order.*

**Purchase Order**

**University Card (One Card)**

**Non-PO Voucher**

**IDT – Interdepartmental Transfer**

**POC – Purchase Order Change;** select if a PO is currently open and needs updating

**PO#:** Number of purchase order to change.

**Change Type:**

Chartfield Change Only – For updating account information.

Decrease Quantity or Cost of Item – To decrease total amount encumbered.

Increase Quantity or Cost of Item – To increase total amount encumbered.

Other Change – Provide detailed description below.

PO Cancel – PO no longer required.

**Reason for Purchase:** Enter the business purpose of the purchase (the “why” behind the need for the purchase and how it relates to the University). *Note: all acronyms must be spelled out.*

**Does this purchase require delivery:** Enter Yes if goods are to be received, or No if only services will be provided.

**Is this a new vendor:** Select either Yes or No.

**Is this an international vendor:** Select either Yes or No.

*Note: international vendors require additional approvals/review.*

**Vendor Name:** Name of company to purchase goods/services from.

**Vendor Point of Contact:** Name of sales contact.

**Vendor Email:** Point of contact email.

**Cost Center/Project ID(s):** Funding source for purchase.

**Item Number(s):** Product number or SKU.

**Product Name/Description:** Detailed description of item or service.

**Quantity of Each:** Number of each item for purchase.

**Price Per Unit:** Dollar amount of each item.

**Shipping Cost:** Total amount for shipping, handling, and freight.

**Total Cost:** Grand total for entire purchase.

**Web Link to product on vendor website:** Enter weblink if available.

**Provide additional information, if needed:** Enter any additional information needed to identify products/services or additional vendor information.

**Attach department chair or cost center manager approval:** Upload written approval, if applicable.

**Notes to BSC:** Enter any additional information the BSC will need to process your request.

**Attachments:** Attach all supporting documentation (quotes, approvals, etc.)

## Travel Authorization

Used for authorizing travel for staff and students on behalf of UTSA. Must be submitted and fully approved **prior** to making travel arrangements.

### Travel Authorization

Travel Authorization

The Travel Authorization is used to authorize travel for UTSA employees and students. Non-employees who are traveling on UTSA business are not required to complete a TA, but must have written agreement (such as a contract) indicating that UTSA will reimburse or pay the non-employee's travel expenses.

*Requested For (First, Last Name)	Employee ID
<input type="text" value="Krystle Navin"/>	<input type="text" value="6001591009"/>
Department	*Business Service Center
<input type="text" value="VPBA BUSINESS SERVICE CENTER"/>	<input type="text" value="VPBA"/>
*Destination (city, state)	
<input type="text"/>	
*Do any of the following apply	
<input type="text" value="-- None --"/>	
*Departure Date	*Return Date
<input type="text"/>	<input type="text"/>
*Reason for Travel (describe the University business to be transacted)	
<input type="text"/>	
*Benefit to the University	*Disposition of Duties
<input type="text" value="-- None --"/>	<input type="text" value="-- None --"/>
Is a Travel Advance requested?	Are traveling expenses being shared with another employee?
<input type="text" value="-- None --"/>	<input type="text" value="-- None --"/>
Is any portion of this trip paid by UTSA?	Do you have a One Card?
<input type="text" value="-- None --"/>	<input type="text" value="-- None --"/>

Submit

Required information

- Destination (city, state)
- Do any of the following apply
- Departure Date
- Return Date
- Reason for Travel (describe the University business to be transacted)
- Benefit to the University
- Disposition of Duties

**Requested For (First, Last Name):** Search for the name the request is for. This will default to the user submitting the request. For admins submitting on behalf of a department head, enter the department manager’s information if they will be managing their cases in ServiceNow. Otherwise, list in the comments and they will be added to the watch list to receive notification when a comment is added to the case.

*Employee ID, Department and Business Service Center will auto-generate based on Requested For.*

**Business Service Center:** Verify VPBA is selected.

**Destination (city, state):** If traveling to multiple cities, enter the city for where the majority of time will be spent.

**Do any of the following apply:**

International Travel – complete and attach the form for [Request to Travel to Restricted Regions](#)

Travel to Washington, DC – complete and attach the form for [State Funded Travel to DC](#)

Other – select if other options do not apply

**Departure Date:** enter the date the trip will begin (employee departs official workstation location).

**Return Date:** Enter the date the trip will end (employee returns back to official workstation location).

**Reason for Travel:** Describe the University business to be transaction (the “why” behind the need for travel and how it relates to the university).

**Benefit to the University:** *If more than one applies, choose the most fitting option.*

- Enhance University operations
- Enhance University reputation
- Enhance graduate/undergraduate curriculum
- Enhance job duty performance
- Help meet contract provisions
- Raise faculty/student support funds
- Recruitment

**Is a Travel Advance Requested:** Select either Yes or No.

**Is any portion of this trip paid by UTSA:** Select Yes if UTSA is funding a portion or entire trip (*airfare, hotel, per diem, etc.*)

**Disposition of Duties:**

- Duties assume by colleagues
- Duties held until return

Duties require travel

No class is missed

Other (select if duties will continue during travel and note in NOTES section)

**Are traveling expenses being shared with another employee:** If Yes – Enter the name of the employee of whom expenses will be shared with.

**Do you have a One Card?** Select either Yes or No.

**NOTE:** For cost estimate fields, do not include the dollar (\$) symbol

**Estimated Meals:** Enter the [GSA rate](#) for the destination city.

**If meals are more than the allowed GSA, please provide justification:** Describe why estimated meals are projected to be more than the GSA rate.

**Estimated Lodging:** Enter the [GSA rate](#) for the destination city.

**If lodging is more than the allowed GSA, please provide justification:** Describe why estimated lodging is projected to be more than the GSA rate (ex.: *conference required staying at this hotel*).

**Estimated Mileage:** Enter the dollar amount for mileage cost – please note in the NOTES section the total number of miles

**Estimated Ground Transportation:** Enter estimated total amount for Uber/taxi, bus, subway, or any other ground transportation.

**Estimated Parking:** Enter estimated total amount for parking rates (street parking, general paid lots, hotel parking, airport parking).

**Estimated Airfare:** Enter estimated total amount for airfare.

**Estimated Registration Fee:** Enter the amount for conference/meeting registration fee, if applicable.

**Estimated Other Costs:** Enter the total amount for other costs such as incidentals (Wi-Fi, baggage fees, tips, etc.)

**Please describe “Other Costs”:** List the type of expenses for the estimated “Other” costs incidentals (Wi-Fi, baggage fees, tips, etc.)

**Total Estimate Travel Cost:** This will auto-populate based on the amounts entered above. *Note: an error will occur if the dollar (\$) symbol is added to the estimated amounts.*

**Cost Center/Project ID(s):** Funding source for the travel expenses.

**Notes to BSC:** Enter any additional information the BSC will need to process your request.

**Attachments:** Attach all supporting documentation (quotes for estimated expenses, MapQuest mileage, approvals, conference/meeting agendas, etc.)

## HR Forms

The forms listed under the HR section of ServiceNow is as follows:

**Contract Additions and Changes** – Create, change or update faculty contracts.

**Faculty Buyout Request Form** – Course or research buyouts for Faculty.

**Funding Change Request** – Change or update funding for filled positions.

**Miscellaneous eForm Request** – Additional Pay, Create Person of Interest, Job Attribute Change, Leave of Absence, New Position Request, Position Attribute Change, Retirement, Return from Leave of Absence, Terminations, Transfer, Zero Percent Appointment

**New/Rehire Request Form** – Create new appointments for staff and students, including rehires and transfers from another UTSA department.

### Contract Additions and Changes Create, change or update faculty contracts.

#### Contract Additions and Changes

Contract Additions and Changes

Attach any supporting documentation using the attachment option at the bottom of the form

*Requested For (First, Last Name)	Employee ID
<input type="text" value="Krystle Navin"/>	<input type="text" value="6001591009"/>
Department	*Business Service Center
<input type="text" value="VPBA BUSINESS SERVICE CENTER"/>	<input type="text" value="VPBA"/>
*Employee ID	
<input type="text" value="Krystle Navin"/>	

Cost Center/Project ID(s)

Actions	Cost Center/Project ID	Amount
No data to display		

\*Justification

\*Effective Date

\*FTE

\*Standard Hours/Week

#### Required information

- Justification
- Effective Date
- FTE
- Standard Hours/Week
- Pay type (months)
- Contract Start Date
- Contract End Date
- Contract Worth
- Auto renewal
- Proposed funding start date

**Requested For (First, Last Name):** Search for the name the request is for. This will default to the user submitting the request. For admins submitting on behalf of a department head, enter the department manager's information if they will be managing their cases in ServiceNow. Otherwise, list in the comments and they will be added to the watch list to receive notification when a comment is added to the case.

*Employee ID, Department and Business Service Center will auto-generate based on Requested For.*

**Business Service Center:** Verify VPBA is selected.

**Employee ID:** This is the employee for which the change will affect. This field will populate based on user. DOUBLE CHECK BEFORE SUBMITTING.

**Cost Center/Project ID(s):** Funding source for faculty contract payments.

**Justification:** Provide a detailed description of the purpose for the addition/change/update.

**Effective Date:** Date the change is to take effect.

**FTE:** Enter the Full-time Equivalent for the appointment (100%, 50%, etc.)

**Standard Hours/Week:** Average hours worked per week.

**Pay Type (months):** Enter how the faculty will be paid:

- Faculty 9/12 – salary spread, paid in 12 equal monthly payments
- Faculty 9/9 – paid over 9 months
- Pay Over Contract – paid over the course of the contract

**Contract Start Date:** Date the contract will begin.

**Contract End Date:** Date the contract will end.

**Contract Worth:** Total salary or payment amount of contract.

**Auto Renewal:** If Yes, specify how many times for auto renewal.

**Proposed funding start date:** For updating the funding source to an existing contract, enter the date the new source of funding will begin.

**Notes to BSC:** Enter any additional information the BSC will need to process your request.

**Attachments:** Attach all supporting documentation (approvals, notice of change, etc.)

---

## Faculty Buyout Request Form

Course or research buyouts for Faculty.

### Faculty Buyout Request Form

Request a course or research buyout

Attach any supporting documentation using the attachment option at the end of the form. Please include approval from the Chair and/or Dean/Associate Dean if your college requires it

**\*Requested For (First, Last Name)**

**Employee ID**

**Department**

**\*Business Service Center**

**\*Faculty Name (Last, First)**

**\*Type of Buyout**

**Course Number(s)**

**\*Percent Effort of Buyout and/or Dollar Amount**

**\*Cost Center/Project ID(s)**

Actions	Cost Center/Project ID	Amount
No data to display		

**\*Start Date**

**Required information**

Faculty Name (Last, First)
Type of Buyout

Percent Effort of Buyout and/or Dollar Amount
Cost Center/Project ID(s)
Start Date

**Requested For (First, Last Name):** Search for the name the request is for. This will default to the user submitting the request. For admins submitting on behalf of a department head, enter the department manager’s information if they will be managing their cases in ServiceNow. Otherwise, list in the comments and they will be added to the watch list to receive notification when a comment is added to the case.

*Employee ID, Department and Business Service Center will auto-generate based on Requested For.*

**Business Service Center:** Verify VPBA is selected.

**Faculty Name (Last, First):** Search for the name of the faculty for buyout.

**Type of Buyout:** Select either Course Buyout or Research/Effort Buyout.

**Course Number(s):** Required for Course Buyout requests.

**Percent Effort of Buyout and/or Dollar Amount:** Total dollar amount.

**Cost Center/Project ID(s):** Funding source for the buyout.

**Start Date:** When the buyout begins.

**End Date:** When the buyout ends.

**Notes to BSC:** Enter any additional information the BSC will need to process your request.

## Funding Change Request

Change or update funding for filled positions.

### Funding Change Request

Funding Change Request

Attach any supporting documentation using the attachment option at the end of the form

\*Requested For (First, Last Name)  Employee ID

Department  \*Business Service Center

\*Position Number

\*Reports to  \*Employee

\*Cost Center/Project ID(s)

Actions	Cost Center/Project ID	Amount
No data to display		

\*Effective Date  End Date (if applicable)

\*Provide justification for funding change

Notes to BSC

**Required information**

- Position Number
- Reports to
- Employee
- Cost Center/Project ID(s)
- Effective Date
- Provide justification for funding change

**Requested For (First, Last Name):** Search for the name the request is for. This will default to the user submitting the request. For admins submitting on behalf of a department head, enter the department manager’s information if they will be managing their cases in ServiceNow. Otherwise, list in the comments and they will be added to the watch list to receive notification when a comment is added to the case.

*Employee ID, Department and Business Service Center will auto-generate based on Requested For.*

**Business Service Center:** Verify VPBA is selected.

**Position Number:** Position number funding change will affect.

**Reports to:** Search from the drop-down list the name the position reports to.

**Employee:** Search from the drop-down list the name of the position's incumbent.

**Cost Center/Project ID(s):** Funding source for additional payment.

**Effective Date:** Date the funding change will take effect. Note: may be impacted by payroll [deadlines](#).

**End Date:** Enter date funding change will expire, if applicable.

**Provide justification for funding change:** Provide a detailed description of the purpose for the funding change. Ensure to include the reason why the change is occurring and the source of funding to support the change.

**Notes to BSC:** Enter any additional information the BSC will need to process your request.

**Attachments:** Attach all supporting documentation (approvals, award/promotion letters, etc.)

---

## Miscellaneous eForm Request

Additional Pay, Create Person of Interest, Job Attribute Change, Leave of Absence, New Position Request, Position Attribute Change, Retirement, Return from Leave of Absence, Terminations, Transfer, Zero Percent Appointment

*\*For employees transferring to a new department within UTSA, the hiring department would submit the Hire/Rehire request form.*

### Miscellaneous eForm Request

All other eform types of request

Please attach any supporting documentation using the attachment option at the end of the form. Attach your departments approval form if available

*Requested For (First, Last Name)	Employee ID
<input type="text" value="Krystle Navin"/>	<input type="text" value="6001591009"/>
Department	*Business Service Center
<input type="text" value="VPBA BUSINESS SERVICE CENTER"/>	<input type="text" value="VPBA"/>

eForm Request ?

\*Effective Date

Position Number (if applicable)

Date of CBC Submission

\*Justification for request

Cost Center/Project ID(s)

Actions	Cost Center/Project ID	Amount
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Required information

**Requested For (First, Last Name):** Search for the name the request is for. This will default to the user submitting the request. For admins submitting on behalf of a department head, enter the department manager’s information if they will be managing their cases in ServiceNow. Otherwise, list in the comments and they will be added to the watch list to receive notification when a comment is added to the case.

*Employee ID, Department and Business Service Center will auto-generate based on Requested For.*

**Business Service Center:** Verify VPBA is selected.

**eForm Request:** Select from the drop-down menu the applicable eForm type.

**Additional Pay** – Continue to Effective Date

Create Person of Interest – Attach completed POI form

Job Attribute Change – Continue to Effective Date

Leave of Absence – Attach supporting documentation

New Position Request – Continue to Effective Date

Position Attribute Change – Continue to Effective Date

Retirement – Attach supporting documentation (*notice of retirement, etc.*)

Return from Leave of Absence – Continue to Effective Date

Termination – Attach supporting documentation (*letter of resignation, etc.*)

Transfer - Continue to Effective Date

**NOTE:** For employees transferring to a new department within UTSA, please submit the Hire/Rehire request form.

Zero Percent Appointment - Continue to Effective Date

**Effective Date:** Date the eForm will take effect. Note: may be impacted by payroll [deadlines](#).

**Position Number:** Position number of the current incumbent.

**Date of CBC Submission:** Enter if applicable (*required for POI requests if third-party is not conducting*)

**Justification for Request:** Provide a detailed description of the purpose for the request. Ensure to include the reason for the change and all applicable information relating to the change.  
(*Ex.: Terminating John Smith, Director of Operations for Campus Services, effective September 1, 2022.*)

**Cost Center/Project ID(s):** Funding source for position.

**Notes to BSC:** Enter any additional information the BSC will need to process your request.

**Attachments:** Attach all supporting documentation (approvals, POI form, notice of retirement, letter of resignation, offer letter, etc.) **Ensure to redact all sensitive data, including SSNs.**

---

## New/Rehire Request Form

Create new appointments for staff and students, including rehires and transfers from another UTSA department.

### New/Rehire Request Form

For Fixed Term Track, Tenure Tenure Track, Student Employee, and Staff New & Re-Hires

Use the attachment option at the end of the form to attach offer letters or memorandum of appointment, org chart, position change request form (fill vacant)

*Requested For (First, Last Name)	Employee ID
<input type="text" value="Krystle Navin"/>	<input type="text" value="6001591009"/>
Department	*Business Service Center
<input type="text" value="VPBA BUSINESS SERVICE CENTER"/>	<input type="text" value="VPBA"/>
*Type of hire	
<input type="text" value="-- None --"/>	
*Applicant Name (Last, First)	
<input type="text"/>	
*Is the employee transferring from a current, active position in a different department?	
<input type="text" value="-- None --"/>	
*Is this a new hire or re-hire?	
<input type="text" value="-- None --"/>	
Date of CBC Submission <span>?</span>	Category of CBC Submitted <span>?</span>
<input type="text" value="Not required for re-hire"/>	<input type="text" value="Not required for re-hire"/>
<input type="text"/>	<input type="text" value="-- None --"/>
*Position Title	Position ID
<input type="text"/>	<input type="text"/>
*Was this position posted in TAM?	
<input type="text" value="-- None --"/>	

Required information

- Type of hire
- Applicant Name (Last, First)
- Is the employee transferring from a current, active position in a different department?
- Is this a new hire or re-hire?
- Position Title
- Was this position posted in TAM?
- Pay Type
- Reports to
- Start Date
- Cost Center/Project ID(s)

**Requested For (First, Last Name):** Search for the name the request is for. This will default to the user submitting the request. For admins submitting on behalf of a department head, enter the department manager's information if they will be managing their cases in ServiceNow. Otherwise, list in the comments and they will be added to the watch list to receive notification when a comment is added to the case.

*Employee ID, Department and Business Service Center will auto-generate based on Requested For.*

**Business Service Center:** Verify VPBA is selected.

**Type of Hire:** Select from Fixed Term Track (Faculty), Tenure Track (Faculty), Student Employee, or Staff

**Applicant Name (Last, First):** Legal first and last name of applicant.

**Is the employee transferring from a current, active position in a different department:** Select either Yes or No.

**Is this a new hire or re-hire:** Select either New Hire or Re-Hire.

**Date of CBC Submission:** date the criminal background check was submitted. *Not required for re-hires if previous appointment was less than 135 days.*

**Category of CBC Submitted:** Select the category of criminal background check submitted. For more information, please refer to the [CBC Category Descriptions](#).

**Position Title:** Enter the position title for the new employee.

**Position ID:** Enter position number for the new employee.

**Was this position posted in TAM:** If yes, enter the TAM/Job ID Number (typically 4 digits).

**Pay Type:** Select either Hourly or Monthly.

**Reports to:** Search from the drop-down list the name of the position's supervisor.

**Start Date:** Applicant's first date of employment.

**End Date:** If applicable- required for Student employees.

**Cost Center/Project ID(s):** Funding source for employee's salary.

**If teaching position, please list all assigned courses:** List all courses the position will be teaching.

**Notes to BSC:** Enter any additional information the BSC will need to process your request.

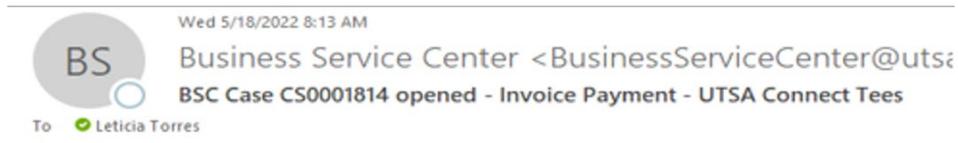
**Attachments:** Attach all supporting documentation (offer letter, workstudy allocation information (if applicable), etc.)

---

## Other Requests

For requests outside of those located in the ServiceNow forms, please email the applicable information to [BAServiceCenter@utsa.edu](mailto:BAServiceCenter@utsa.edu). A Specialist will enter the service request into ServiceNow and open a case on your behalf.

When a case is opened on your behalf, you will receive a confirmation email from [BusinessServiceCenter@utsa.edu](mailto:BusinessServiceCenter@utsa.edu) and you will be able to track the status through MyCases.



A case has been opened on your behalf.

Details:

Case Number: [CS0001814](#)

Requested For: Leticia Torres

Business Service Center: VPBA

Form:

Opened: 2022-05-18 08:05:40

## Budget Transfers

Email the following:

- Detailed justification on the need for the transfer
- FROM cost center
- TO cost center
- Transfer amount
- Indicate whether the transfer is permanent budget or temporary (current year) savings
- Attach supporting documentation and approvals

## System Access

Email the following:

- EMPL ID and name of employee needing access
- Description of access needed

## PaymentWorks Vendor Creation

Email the following:

- Vendor name
- Vendor contact name
- Vendor contact email
- Description of goods/services provided by vendor
- Attach any supporting documentation

## Chart of Accounts Changes

Email the following:

- Scope of the change (*create new cost center, inactivate cost center, etc.*)
  - Justification/purpose for the change
  - Name of cost center
  - Fund and function of cost center
  - For new cost centers, are funds being transferred in from an existing cost center?
    - If so, please list.
  - Name and contact information for individual to be set as cost center approver
-

## Submission and Tracking

After clicking submit on the request form, the following screen will appear.

The screenshot displays the ServiceNow portal interface for a ticket titled "MISCELLANEOUS EFORM REQUEST". The ticket is currently in the "Open" state, as indicated by the highlighted bar at the top. The "Request Details" section on the left provides the following information:

REQUEST DETAILS	
Number	CS0001434
State	Open
BSC	VPBA
Department	VPBA BUSINESS SERVICE CENTER
Created	05/06/2022 14m ago
Updated	10m ago

The "Attachments" section is currently empty. The "Options" section is visible at the bottom of the ticket details. The main content area shows a message history with two entries from Krystle Navin (KN):

- 2022-05-06 11:09:53: G.Orta\_Work Study Confirmation.pdf (207.2 KB)
- 2022-05-06 11:10:31: CS0001434 Created

Track your request using the top information bar, or refer to "State" in the Request Details section. Updates to the tracking status will occur in real-time – no need to refresh the page!

Upon submission, the status will show NEW, meaning a Specialist has not yet been assigned. When the status changes to OPEN, a Specialist has been assigned and has begun processing your request.

**Please allow for 5 business days for status to change to OPEN.**

All communications will occur within the ServiceNow portal. Should the need arise to contact the BSC outside of the portal (i.e. phone), please reference your case number. The case number can be found under the Request Details section and will begin with CS followed by 7 digits.

## Status

**New** – Case has been submitted. A Specialist has not yet been assigned to your request.

**Open** – A Specialist has been assigned to your request and has begun processing your information.

**Awaiting Info** – More information is needed to process your request -OR- the request has been submitted to another department for processing.

**Resolved** – The BSC has processed your request and is awaiting your acceptance to close the case.

*Note: Once resolved, the case will auto-close within 10 days unless you take action to reject or accept and close.*

**Closed** – Case has been closed. No further action can be taken. You may close the request at any time by clicking “Close Case” under the Actions section.

## Comments and Notifications

The comment section is where the BSC Specialist will communicate any updates regarding the opened case. When a new comment is added, you will receive an email notification – please ensure to review the comment as additional information may be required from you to continue processing the request.

UTSA The University of Texas at San Antonio

UTSA Home myUTSA UTSA Today Maps Directory Enterprise Services Apply Visit Request Information

SERVICE CATALOG KNOWLEDGE BASE MY CASES KRISTLE NAVIN

HOME > TICKET FORM Search

New Open Awaiting Info Resolved Closed

Actions  
Close Case

REQUEST DETAILS

Number	CS0001434
State	Open
BSC	VPBA
Department	VPBA BUSINESS SERVICE CENTER
Created	05/06/2022 14m ago
Updated	10m ago

ATTACHMENTS

MISCELLANEOUS EFORM REQUEST

Type your message here... Send

BSC communications

Start

Your communications

Options

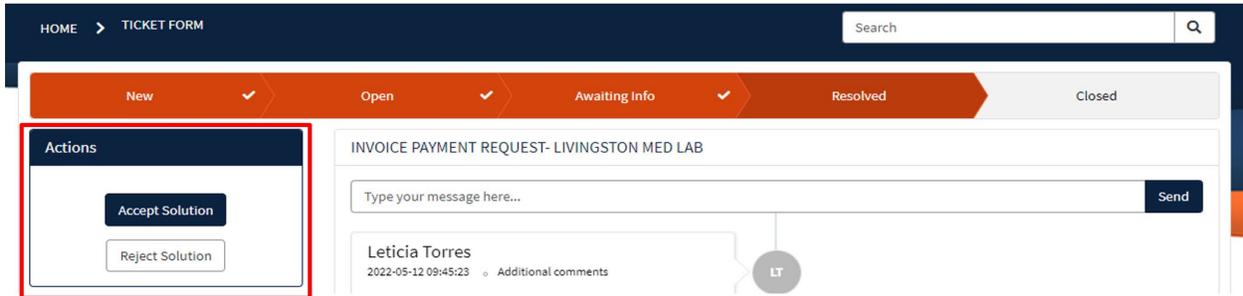
## Proposed Solution

An email notification will be sent when your Specialist has proposed a resolution for your request. In the ServiceNow portal under the case, *Action* will appear for you to Accept or Reject the resolution.

Accept Solution – by clicking Accept, the case will close.

Reject Solution – Rejecting the solution will keep the case open.  
*A comment is required when rejecting.*

If no action is taken with the proposed solution, cases will automatically close after 10 days.



## Close Case

To close your case, you will click on Close Case in the Actions section. You will have the ability to close your case at any point.

Reminder: once you close a case it cannot be re-opened, but you will retain access to the case for future reference.

If you choose to close the case prior to a resolution being proposed, please add a comment to the case through the ServiceNow portal letting your specialist know why you are closing the case.

## Referencing a Prior Case

The case number is a unique identifier for your service request. By referring to this number, the BSC staff can easily locate your service request and can reference the case and its activity. When two or more cases are submitted that are connected, please indicate in the NOTES section of the form the prior submitted case number. For example, one BEF can have multiple components such as expense reimbursement, invoice payment, and procurement request.

To find your case number, go to My Cases – the case number will be listed in the first column titled “Number”. Upon submitting your service request form, the case number will auto-generate and will appear under the Request Details section. All case numbers will begin with CS followed by 7 digits.

The MyCases section will list all service requests you’ve submitted, including open, awaiting info, and closed cases. After a request is submitted, the case can be viewed at any point to check status, review comments added, and provide additional information if needed.

*Note: For travel reimbursement requests, the case number of the approved travel authorization is required to link the travel authorization to the reimbursement in ServiceNow.*

The screenshot displays the 'My Cases' page in the Business Service Center. At the top, there is a navigation bar with the UTSA logo and links for 'UTSA Home', 'myUTSA', 'UTSA Today', 'Maps', 'Directory', and 'Enterprise Services'. Below this, there are tabs for 'SERVICE CATALOG', 'KNOWLEDGE BASE', and 'MY CASES'. A search bar is located below the tabs. The main content area shows a table of cases with columns for 'Number', 'Short description', 'BSC', 'State', 'Updated', and 'Created'. Two dropdown menus are open, showing options for 'My Cases', 'Open Cases', 'Action Needed', and 'All Cases'.

Number	Short description	BSC	State	Updated	Created
		VPBA	Open	2022-05-05 14:41:58	2022-05-05 14:41:35
		VPBA	Resolved	2022-05-05 14:19:09	2022-05-03 11:37:23
		VPBA	Resolved	2022-05-05 14:17:19	2022-05-03 11:29:03

## Resources

### **Technical Support:**

If you experience technical difficulties, loss of service or systems, or have a general technical question, please contact [Tech Café](#) at [techcafe@utsa.edu](mailto:techcafe@utsa.edu) or 210-458-5555 Monday-Friday, 7:00am-7:00pm (CST).

### **UTSA Forms**

- [Mileage/Parking Log](#)
- [Sales Tax Exemption Form](#)
- [Business Expense Form](#)
- [Declaration of Missing Evidence](#)
- [Position Change Request Form](#)
- [Vendor POI Form](#)
- [Staff Salary Supplementation Form](#)

### **Policies:**

- [Handbook of Operating Procedures](#)
- [Financial Guidelines](#)
- [UTSA Policy and Procedures](#)
- [University Records Retention](#)
- [Regents' Rules and Regulations](#)
- [Texas Prompt Payment Law](#)

### **Useful Guides:**

- [Budget Transfer Funds Rules Matrix](#)
- [BA BSC Resources](#)
- [UTSA Preferred Suppliers](#)
- [Chart of Accounts and Allowable Fund Types](#)