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.

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.
Portal Homepage:

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

2 **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.

3 **Knowledge Base**: COMING SOON – Reference guides and resources.

4 **Search**: Search for Knowledge Articles and Forms using key words.

5 **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.

6 **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.

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.

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.)
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.**

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.

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**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](#).

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**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):** Kryzie Levin
- **Employee ID:** 5001560169
- **Business Service Center:** VPBA

**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?**

- **None:**

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**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:

- Airfare
- Hotel
- Car Rental
- Per Diem
- Transportation (train, subway, taxi, etc.)
- Parking
- Mileage / MapQuest
- Registration
- Incidental
- Conference/meeting agenda
- BEF
- Approvals
- Other

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.

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.)

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**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.

**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.

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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).

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.)

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**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)
  - Kymelle Fiskin

* Department
  - VPBA BUSINESS SERVICE CENTER

* Business Service Center
  - VPBA

* Destination (city, state)

* Do any of the following apply
  - None

* Departure Date

* Return Date

* Reason for Travel (describe the University business to be transacted)

* Benefit to the University
  - None

* Is a Travel Advance requested?
  - None

* Are traveling expenses being shared with another employee?
  - None

* Is any portion of this trip paid by UTSA?
  - None

* Disposition of Duties
  - None

* Do you have a One Card?
  - None

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**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.

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**Contract Additions and Changes**

Create, change or update faculty contracts.

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**Contract Additions and Changes**

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

- Requested For (First, Last Name) Krystyle Naolin
- Employee ID 6001591009
- Department VPBA BUSINESS SERVICE CENTER
- Business Service Center VPBA
- Employee ID Krystyle Naolin
- Cost Center/Project ID(s)

<table>
<thead>
<tr>
<th>Actions</th>
<th>Cost Center/Project ID</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Justification
- Effective Date
- FTE
- Standard Hours/Week
**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.

**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.

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**Funding Change Request**

Change or update funding for filled positions.

**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.*

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.

<table>
<thead>
<tr>
<th>Requested For (First, Last Name)</th>
<th>Employee ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kryzlie Navin</td>
<td>6001551009</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Department</th>
<th>Business Service Center</th>
</tr>
</thead>
<tbody>
<tr>
<td>VPBA BUSINESS SERVICE CENTER</td>
<td>VPBA</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Type of Hire</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Applicant Name (Last, First)</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Is the employee transferring from a current, active position in a different department?</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Is this a new hire or re-hire?</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date of CBC Submission</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not required for re-hire</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Category of CBC Submitted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not required for re-hire</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Position Title</th>
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</table>

<table>
<thead>
<tr>
<th>Position ID</th>
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</thead>
</table>

<table>
<thead>
<tr>
<th>Was this position posted in TAM?</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
</tr>
</tbody>
</table>

**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. 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 and you will be able to track the status through MyCases.

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.

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.
**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.
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 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