

FY22 UCANR Administrative and Support Services Customer Satisfaction Survey

Financial Services

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PRIMARY OPPORTUNITIES			ACTIONS TAKEN/IN PROCESS	OUTCOME/HIGHLIGHTS
Prior Year	Current Year (2020-21)	PO Identified		
0.00	3.14	Approval time	<p>Review the current approval workflow to identify the opportunity to improve</p> <p>Communicate to the units and customers for any review/approval delays</p> <p>Discuss with the units and customers for a better understanding of the review and approval flow</p> <p>Collaborate with all business units, request prior notification for volume and urgent requests</p> <p>Work with WFA project to add Exception Approval, and System Access Request to the WFA</p> <p>12/31/22 Update: Financial services continued the effort to improve, monitor the doc review process and communicate with major stakeholders (ex UCCE, Rec and Statewide units).</p> <p>6/23 Updates regarding the KFS workflow approval process. We have made improvements by dedicating staff members to review and approve documents twice a day. Additionally, the Key KFS team is actively involved and reaches out to initiators if any document in question or need clarification for the documents created.</p> <p>Furthermore, the FS team is reminding business managers to inform them if there are any high-volume documents on the way. This process will undergo changes once we go live with AE, and a new Service Level Agreement (SLA) will be defined accordingly.</p>	<p>Improve approval time and keep the customer informed of the review status by Nov 22</p>
0.00	3.13	Effectively uses website and online documentation	<p>Update the website to reflect the staff changes</p> <p>Review and update the policy and information link</p> <p>Share the useful relevant information link with the ANR units</p> <p>9/16/22 - website is updated to reflect the current FS and Aggie Enterprise Staff</p> <p>By 10/31, FS plans to update all the policy and information link updated</p> <p>12/31/22 - In Progress. FS updated content information, some are updated, and some under review. Will continue the effort updating our site</p> <p>6/23 updates - the FS website has been recently updated with the most current information. We have dedicated staff members who review and update the site regularly to ensure its accuracy and relevance.</p> <p>One notable update is the list of Business Managers, which was outdated previously. It has now been refreshed with the current list. Going forward, FS will collaborate with unit directors to update this information on a quarterly basis, ensuring its ongoing accuracy.</p> <p>Additionally, pleased to share that most of the policy and information links on the website are up-to-date, providing users with the latest guidance and resources.</p>	<p>Provide easy navigation and useful information by Dec 22, the final updates were completed by AK in February 2023</p>
0.00	2.96	Clear procedures	<p>Communicate any update of policy and process via email and meetings</p> <p>Post the updated information and procedures on the FS website</p> <p>Keep and summarize questions and answers in FAQ and post it online</p> <p>By 10/31, FS plans to update all the policy and information link updated</p> <p>12/31/22 - some policy sites are updated and some under review</p> <p>6/23 - a significant number of policy and information links on the FS website have been recently updated. This ensures that users have access to the most current guidance and resources for their reference. We will continue to monitor and update procedures as needed to maintain their accuracy and relevance.</p> <p>I'm also pleased to share that the FY24 ANR new rates and year-end close guidelines have been updated on the website. These resources provide valuable information for financial planning and reporting purposes.</p> <p>As of 6/23, the process of summarizing questions and answers in the form of Frequently Asked Questions (FAQ) is still underway. The team is actively working on compiling relevant inquiries and their corresponding responses to create a comprehensive FAQ section.</p> <p>This initiative aims to provide users with a centralized resource where they can find answers to common queries related to financial policies, procedures, and other relevant topics. The goal is to enhance user</p>	<p>Readily help all units to access and clarification of the relevant process procedures, The links final updates were completed by AK in February 2023. the only part that doesn't work is the ask question which a ticket is raised with IT</p>
0.00	3.06	Training for clientele	<p>Meet with key clientele to better understand and identify the training needs</p> <p>Set up Office Hour, develop FAQ, record training sessions and post online</p> <p>Collaborate with all units to help training new staff, managers, directors and provide policy, procedure process information</p> <p>As of 6/23, there is a strong emphasis on training and addressing the training needs for the new Aggie Enterprise Financial System. FS has recently launched dedicated office hours specifically aimed at providing training and support for the system. The initial meetings have yielded positive results, and these sessions will continue leading up to the go-live date and potentially during the hypercare period.</p> <p>In addition, FS has set up Zoom office hours to address any questions or provide clarifications related to year-end close processes. This platform offers ANR members the opportunity to seek guidance and receive assistance regarding year-end activities.</p> <p>These initiatives underscore the commitment of FS to ensure smooth transitions, enhance user knowledge and capabilities, and address any concerns or uncertainties during critical periods such as system</p>	<p>Readily share information and provide the training needed to help the units with their projects and tasks</p>

ADDITIONAL OPPORTUNITIES IDENTIFIED (e.g. verbatim/themed comments, secondary opportunities)	ACTIONS TAKEN/IN PROCESS	OUTCOME/HIGHLIGHTS
Understanding my needs and requirements /3.14	TBD	TBD
Clarity of Policy/3.06	TBD	TBD
Communication/3.17	TBD	TBD