Requesting HR Support

There are multiple ways to open a ticket to request help:

- Go to sharedservices.berkeley.edu and click on Submit a ticket.
- Call 643-9000, choose option 3 for HR/APS support and follow the prompts.
- Email hrapschelp@berkeley.edu
- Email itcsshelp@berkeley.edu
- Go to blu.berkeley.edu and click on Campus Shared Services. Then click on “Submit Ticket Here”
- To request IT support, go to blu.berkeley.edu and click on Campus Shared Services. Then click on “Submit Ticket Here”

CSS HR partner: Najah Trotty (ntrotty@berkeley.edu; 664-9786). CSS HR forms: http://diversity.berkeley.edu/forms

Transaction type You need to:

Job classification (only for getting a new position classified for the first time)

Send job description and classification request to Najah Trotty (be sure to cc Debbie Fong). Najah will forward to central HR. (A position must be classified by central HR/Compensation and funding must be approved internally.) If creating a new student position, be sure to identify whether the position will be work study or non-work study.

Recruitment

Staff and non-Work-Study Students

1. If the position is subject to the campus hiring freeze, submit a Request for Exception to the Hiring Freeze to Debbie Fong.
2. Complete the Staff (or Student) Recruitment Form and get approval from program manager.
3. Complete the Position Management Form if you need to create a new position management number or make changes to an existing number (e.g., increase headcount). If you have an existing job title and position management number, you do not need to fill out the Position Management Form.
4. Send all forms with approvals and job description to Najah Trotty.
5. If the position requires a criminal background check, please include a completed ION as well.

Working-Student Students

CSS will post new work-study listings or repost job listings. If you have a work-study eligible student to refer to a specific job, CSS will contact the student and initiate the referral process. Complete the Student Recruitment Form if:
1. It’s a new work-study position, or
2. There is a change to an existing position.
If you have an existing posting number, and no changes need to be made, you don’t need to complete a referral form. Simply open a ticket with HR/APS to request reposting. (If ready to hire, follow hiring instructions.)

Hiring

Complete the appropriate Appointment Form (Staff or Student). Include the following:
- Job description and PIM
- Other required documents (e.g., ION for criminal background check)

For career and contract positions, the Appointment Form needs to be reviewed and approved by Debbie Fong. Submit all items via a HR/APS ticket with a cc to Najah Trotty.

Benefits orientations
- 457 Evans Hall
- Tue and Wed at 10:30am

Employee relations or labor relations

If you need information regarding layoffs, performance improvement plans, disciplinary actions, or other complex employee/supervisor interactions contact Najah, with a cc to Debbie Fong.

Employee referrals

Job posting

If you have an existing posting number, you don’t need to complete a recruitment form. Simply open a ticket with HR/APS to request reposting. (If ready to hire, follow hiring instructions.)

New position request

If you need to create a new position management number, submit a Request for Exception to the Hiring Freeze to Debbie Fong. Complete the Staff Recruitment Form if:
- Submit all items via a HR/APS ticket with a cc to Najah Trotty.
- Najah will upload and post the item(s) to your location and handle any necessary set-up or data migration. When selecting a new copier, CSSIT

Purchasing IT-related products and services

1. Email your program approver (see next page) with detailed information on what you want to order.
2. The program approver will provide funding information and then forward to the program procurement lead, who is responsible for opening a ticket with CSSIT.

The following items/services are handled by CSSIT: desktop computers, laptops, tablets, smartphones, landlines, and printers. A CSSIT tech will deliver the item(s) to your location and handle any necessary set-up or data migration. When selecting a new copier, CSSIT recommends departments open a copier through the UCSF/Berkeley print management program.

Note: CSSIT support may be limited, or unavailable, if you choose to order non-JACS standard computers. (JACS computers are the campus-recommended Mac and PC models.)

Information Technology (IT) support

1. Go to sharedservices.berkeley.edu
2. Click on Submit a Ticket (located in the upper left corner of the page)
3. A submenu appears. Click on IT
4. After authenticating with your CalNet ID, an Information Technology form appears. Fill in your basic info (name, phone number, email) and pre-filled fields. Then click on “Submit a Ticket.”

How can we help you?

- 1. Go to sharedservices.berkeley.edu
- 2. Click on Submit a Ticket (located in the upper left corner of the page)
- 3. A submenu appears. Click on IT
- 4. After authenticating with your CalNet ID, an Information Technology form appears. Your basic info (name, phone number, email) is pre-filled

Enter your location, detailed information about the problem you are experiencing (or the service you need), and the urgency. Click on Create Ticket.

Important: When submitting a ticket be sure to include Debbie Fong.
### Business and Financial Services (B&FS)

**For all B&FS transactions in E&I:**

All transactions require approval by the program approver. The program approver will identify a funding source (chartstring or fund name), add it to the email request, and forward to the program procurement lead for action. The email serves as electronic approval.

<table>
<thead>
<tr>
<th>Transaction type</th>
<th>You need to:</th>
<th>System used</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Purchasing</strong></td>
<td>Email your program approver with details on items/services to be purchased. If you would like CSS to purchase your item on a bluCard please indicate so in your email.</td>
<td>BearBuy</td>
</tr>
<tr>
<td><strong>Pre-Approval</strong></td>
<td>Email your program approver with a proposed amount and purpose of your request and justification. You need an affirmative response from your program approver for the request to be considered pre-approved.</td>
<td>BearBuy request submitted by program procurement lead</td>
</tr>
<tr>
<td><strong>Payment Requests</strong></td>
<td>Email your designated program approver with your request. Reimbursement requests should include scans of the detailed original receipt(s) with reason for purchase. Request should be emailed to program approver.</td>
<td>BearBuy request w/signed entertainment reimbursement request form, emails, and electronic receipts</td>
</tr>
<tr>
<td><strong>Entertainment Reimbursement Requests</strong></td>
<td>Pre-approval from program approver is required. Provide original receipts in chronological order to Program Procurement Lead and set up a time to sign completed Entertainment Reimbursement Claim Form. (Original signatures from you and the program approver are required on the form.)</td>
<td>Program Procurement Lead submits approved catering request to vendor in BearBuy</td>
</tr>
<tr>
<td><strong>Travel Reimbursement</strong></td>
<td>Pre-approval from program approver may be required; check ahead of time with your approver. Traveler should provide original receipts in chronological order to Program Procurement Lead and set up a time to sign completed Travel Reimbursement Claim Form. (Original signatures from you and the program approver are required on the form.) Timely submission for reimbursement is essential.</td>
<td>BearBuy request w/signed travel reimbursement request form, emails, and electronic receipts</td>
</tr>
<tr>
<td><strong>Catering</strong></td>
<td>Pre-approval from program approver is required. Email your program approver with details on the catering request in advance. Be sure to include all information that will be required for placing the order.</td>
<td>Program Procurement Lead submits approved catering request to vendor in BearBuy</td>
</tr>
<tr>
<td><strong>Student Awards/Stipends</strong></td>
<td>Email your departmental DSAS preparer with information about the student receiving the award. Check with your DSAS preparer for required forms and information that you need to submit. Each program will have a designated DSAS reviewer as well.</td>
<td>Designated DSAS preparer enters in DSAS</td>
</tr>
<tr>
<td><strong>BluCard (dept-held)</strong></td>
<td>Email your program approver with the items/services you need to purchase and indicate the need to purchase on the program bluCard. The program approver will forward the request to the the dept bluCard holder to complete the order.</td>
<td>The cardholder must reconcile in BFS</td>
</tr>
<tr>
<td><strong>Campus Recharge Services</strong></td>
<td>Email your program approver with information about the service you require. Services might include mail services, media services, printing requests, classroom requests and room rentals, criminal background checks (coordinate with HR), meeting &amp; event spaces.</td>
<td>IOC</td>
</tr>
<tr>
<td><strong>Checks and donations</strong></td>
<td>Email your program approver with information about the service you require. Services might include mail services, media services, printing requests, classroom requests and room rentals, criminal background checks (coordinate with HR), meeting &amp; event spaces.</td>
<td>CDS</td>
</tr>
<tr>
<td><strong>Cash advance</strong></td>
<td>Email your program approver with details on the request and include a line item explaining what the cash is to be used for. Requests must be submitted to your program approver at least 1 month in advance.</td>
<td>BearBuy Must be reconciled immediately after trip</td>
</tr>
</tbody>
</table>

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* If a Program Manager is submitting for reimbursement, approval goes to the Executive Director.

** If you make last-minute purchases, or purchases from non-Bear Buy vendors, you may use a personal credit card or a US Bank Travel Card and then submit your expenses for entertainment reimbursement. (US Bank Travel cards are personal credit cards that employees may use for business expenses and then submit for reimbursement.)