CALS Business Operations (CBO) “Go Live” February 2
Summary of key changes and what to expect

The CBO go-live launch represents many months of work spent assessing, re-engineering, documenting, and training staff on new processes and procedures as well as customer service. The launch marks the beginning of a series of improvements that will be gradually implemented over the course of the spring semester.

What is changing now?

- Business Liaisons will begin ‘in-service’ hours in departments beginning February 2. This means that the assigned liaison will spend 2-4 hours on a weekly basis for walk-in questions or concerns. This may be reassessed in the future to determine whether any adjustments need to be made. Over time, the liaison team will develop a depth of knowledge of your department that will enable a more customized level of service.
  - While liaisons are not expected to replace departmental bookkeepers or business service coordinators, they will be responsible for ensuring your questions and concerns are addressed. If they are not able to address the issue immediately, they will navigate the CBO (accounting services, budget, contracts and grants) and other University offices to ensure issues are addressed timely and consistently.
- We recommend emailing your liaison if the need arises outside of in-service hours. You may also contact your liaison by phone at 515-4CBO (515-4226). Liaisons do not yet have individual call center extension lines, so you may be transferred by another member of the liaison staff. Dedicated extensions are expected some time in the coming weeks that will allow for direct connection.
- You may continue submitting paperwork (invoices, PCard, bills, etc.) as you presently do. Or, you may give the paperwork to your liaison while they are in your building if it is more convenient for you.
- Transactional work is transitioning from Post-Award Consultants to Accounting Services staff. This will free up time for Post-Award Consultants to be more proactive and consultative in nature.
  - The consultants will be able to conduct monthly compliance reviews to identify issues in a timely manner and follow up as needed.
  - The consultants will schedule a pre-closing conference with a PI 60 to 90 days prior to the award end date to identify any lingering issues that need to be addressed.

What is on the horizon over the spring semester?

- The Business Liaison call system will be implemented in the coming weeks. The system will allow the liaison team to ensure redundancy – a call will be answered immediately or returned within hours. The call system will eventually interface with the case management system to allow us and our customers to track issues as they are resolved.
- A Case Management System will be implemented in the coming months. The system will allow you to track the status of questions or concerns that have been directed to the CBO. It will also eventually allow us to accept documents for processing (receipts, invoices, bills, even proposals) and to facilitate tracking and status updates.
- The CBO will be forming an advisory committee with input from department heads. This committee will form an important partnership in communication and providing advice about policies, procedures, and service.
  - Service Level Agreements will be drafted in collaboration with the advisory committee and faculty to articulate time frames concerning how long a process or transaction should take.
- A training curriculum that is geared toward acclimating new employees to CALS business processes and to serve as refresher courses for seasoned staff.
- Hiring in the Budget Office that will allow for the opportunity to hold regular meetings to advise department heads on managing non-grant resources.

**Business Liaison Assignments**

**Until a fourth liaison team member is hired, the departments in the BL 4 column will be handled temporarily by other liaisons. The temporary assignments are underlined.**

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<tr>
<th>Molly</th>
<th>Christy</th>
<th>Brenda</th>
<th>Latrice</th>
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<td>Crop Science</td>
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