**FY22 UCANR Administrative and Support Services Customer Satisfaction Survey**

## Financial Services

| 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 | Review the current approval workflow to identify the opportunity to improve<br>Communicate to the units and customers for any review/approval delays<br>Discuss with the units and customers for a better understanding of the review and approval flow<br>Collaborate with all business units; request prior notification for volume and urgent requests<br>Work with WFA project to add Exception Approval, and System Access Request in the WFA<br><br>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). | Improve approval time and keep the customer informed of the review status by Nov 22 |
| 0.00 | 3.13 | Effectively uses website and online documentation | Update the website to reflect the staff changes<br>Review and update the policy and information link<br>Share the useful relevant information link with the ANR units<br><br>9/16/22 - website is updated to reflect the current FS and Aggie Enterprise Staff<br><br>By 10/31, FS plans to update all the policy and information link updated<br><br>12/31/22 - In Progress. FS updated contact information, some are updated, and some under review. Will continue the effort updating our site. | Provide easy navigation and useful information by Dec 22 |

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| 0.00 | 2.96 | Clear procedures | Communicate any update of policy and process via email and meetings<br>Post the updated information and procedures on the FS website<br>Keep and summarize questions and answers in FAQ and post it online<br><br>By 10/31, FS plans to update all the policy and information link updated<br><br>12/31/22 - some policy sites are updated and some under review | Readily help all units to access and clarification of the relevant process procedures |
| 0.00 | 3.06 | Training for clientele | Meet with key clientele to better understand and identify the training needs<br>Set up Office Hour, develop FAQ, record training sessions and post online<br>Collaborate with all units to help training new staff, managers, directors and provide policy, procedure process information | Readily share information and provide the training needed to help the units with their projects and tasks |

| **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 |
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