

Business Community Open Forum
Recap – May 24th, 2005
Theme: Training

Panelists covered training offered in their areas:

Foundation-Rita Williams:

- Gift Report I – how to complete gift report for UA and UA Foundation
- Gift Reporting II – Foundation policies and procedures
- Provide on site training for larger colleges (10-15 employees).
- One on one training with new employees.
- Register for Gift Report I and II via ISW website – Training (www.fso.arizona.edu/isw/)

PACS – Patty Taylor:

- PACS re-organized over a year ago – now we have a single unit with consistent look and feel.
- You can register for Online Line Requisitioning (OLR) through ISW.
- New website going live in August, will list training classes on it.
- Designing web based training as well
- Provided hand out with classes offered by PACS.

Systems Control – Priscilla Cantu:

- Systems Control is responsible for maintaining the data in PSOS, encumbrances in FRS, operating budget. Last year they processed over 60,000 documents – cyclical work load – major production mode during opening of school.
- Offer PSOS beginners guide that is available on the Systems Control website or on disk upon request. Tutorial emulates PSOS -login info, navigating, accessing data element help. At the end of the tutorial the users can get certificate for course credit. The tutorial is the pre-req for class room sessions.
- Classroom sessions focus on PSOS as a tool for hiring and change documents. 5 sessions geared toward different types of employees. Register for classes via ISW website – Training (www.fso.arizona.edu/isw/)

FSO-Financial Management –Mark McGurk

- Survival Guide - Good starting point for new employees – for UA and funds administration.
- All other training and tutorials are listed on FSO website under Training.

FSO –Operations – Andrea Lee

- FLSA – co taught with HR – timesheets, paying individuals.
- ISW and Other FSO Online Resources – Overview of what is on ISW and some of the FSO websites we have.
- Time Roster Training for those who process or approve time roster.
- Employee Link – continuing to go out to departments.
- One on One training as needed.
- International tax questionnaire –
- Looking into travel/training, payroll rep training, refresher courses.
- POPR training may come back.
- If interested in these, please let us know so we know what is in demand.

Risk Management – Steve Holland:

- Most training we do is OSHA related - Loss prevention and insurance.
- Specialized training for Radiation, regulatory type training is available.
- Scheduled on demand and by demand as needed.
- Continuing training – general lab, blood born, etc.
- Fire extinguisher training – asbestos awareness, etc. –
- Shipping hazardous materials by air
- HOV training – now 2 part with classroom and road test (behind the wheel) – van is available at no cost.
- Specialty training: respirator use – OSHA regulations
- Ergonomics training – available with well qualified Industrial hygienist.
- Operating forklifts, etc. training is required and available.
- Hazard communication - #1 violations in US – videos and kits are available.
- Some partner areas: HR and Life and Work – substance abuse – particularly for drivers.
- Field Safety work safety.
- Just about anything else related to risk.
- Insurance side: Workers comp procedures.
- Property and liability training offered upon request.

Sponsored Projects – Janet Hornung:

- Just in time training - When you have an assignment that you need to do and you find overwhelming – don't wait – call us and we will get you started with that assignment and help you become educated in the area of research accounting. Call us.
- We offer classes and accept invitations to customize training for you.
- Group of tapes (\$10,000 worth) that the Research Administrators Group (RAG) asked us to buy. Tapes can be checked out through RAG. Courses are taught by the best in nation.
- Assuming you are interested in furthering your career – the best way is to make contact with others – take assignments that stretch you and call your network friends. Take advantage of the panel and learn from us. We love to share our knowledge. You asked for training – here it is – when you leave the room find someone you don't know and meet them – take this opportunity to make contact with others you wouldn't regularly meet.

Human Resources:

- Call as soon as you need help – we tend to offer a blitz of education during new things – ie. Career track, etc. Don't wait for us to come to you.
- Professional Skill Institute – ULI and Supervisory Skills – we come to you or you come to us.
- Financial Education – more personal than professional.
- Requests for: Leave Management – website will be launched in next couple of weeks for definitions, calculations, etc. for this complicated area.
- FLSA work –
- Announcements: Everyone at the U should have a NetID ([HTTP://netid.arizona.edu](http://netid.arizona.edu)) – 1060 employees don't have them. A NetID gives people access to several online systems, including Employee Link, where employees can update their addresses, view their pay stubs and benefits statements, etc. Please be sure all the employees you work with get their NetID and update their addresses via Employee Link (<http://emplynk.arizona.edu>) for the next Benefits package.

- Fingerprinting will begin in September rather than the background checks. Fingerprints are forever rather than 7 years – we will be communicating to you through training sessions.
- Employment Policies Review Team: Almost through with report
- Cathy Nicholson is new HR Director at AHSC

Internal Audit – Les Clark:

- We perform audit services we don't train but we make recommendations.
- We help decide if people are adequately trained in their processes.
- Often directed at training and monitoring for success.
- This requires us all to be a student and a teacher.
- We see departments are struggling with the training and leadership needed to make it happen.
- It only seems reasonable that the senior business person insures mentorship is available to new folks. They need detailed guidance.
- Use sister departments concept for cross-training.
- Bursar cash handling process – please be sure anyone who handles cash attends so we can clear the good names of those that are not responsible – it is impossible to clear a name without good procedures and it follows you everywhere. Nancy Hanson puts it on and many folks bail on that training. Register via ISW.
- We typically point department to available training. Sometimes departments need to work through college or high level unit to get exact training.
- Janet was true to her word from the last session – we put her together with a dept. that needed her – and she was there.
- Relevant Questions to ask:
 - Do we give a fish or do we teach them how to fish?
 - Do we provide the answer or point to a resource and monitor knowledge?
 - Can we find mentors for everyone?
 - Do we identify existing sources for training and embrace the training that's there?
 - Can we partner someone less knowledgeable with someone who is more knowledgeable.

FROM THE AUDIENCE:

Carie Horner – College of Nursing – To RITA:

Had experience working with Toni regarding scholarships account. Toni was knowledgeable of FRS and Scholarship accounts and was able to relate the whole picture. Very positive experience.

Ted Davis –College of Science to audience

- I like the idea of a web site where all the training should be...all colleges should have that website linked to their business website. It is a two-way street – they are trying to provide the training and our job is to get the people to the training –
- Refresher courses – everyone needs to go to training not just new people. If you learn just one thing in a training session it is worth it....
- Send your people to training – it's your responsibility.

Glory Novak, Human Resources:

Question: Do we still offer NACUBO 2-day Fund Accounting – it taught us designated account, etc. do we still offer it – if not – can we??

Answer: FSO no longer offers this, however, WACUBO offers an Accounting series (Intro & Intermediate) twice a year. Following is WACUBO's professional development calendar (<http://www.wacubo.org>) Additionally, NACUBO offers professional development classes live and via the web (<http://www.nacubo.org/x41.xml>)

FALL 2005		
Location	Topic	Dates
Salt Lake City	Accounting Series (Intro & Intermediate)	October
Las Vegas	Grants & Sponsored Programs Accounting	Nov. 9, 2005
Los Angeles	Fin. Aid - how it relates to the Bus. Officer	Dec. (early)
SPRING 2006		
Tucson	Perf Mgmt & Assessment/Benchmarking	January
Portland	The Academic Business Officer	February
Los Angeles	Accounting Series (Intro & Intermediate)	March
WEBINAR	Chg Mgmt & Emotional Intelligence	March

Request: I appreciate both the web and classroom resources but if we are doing something wrong – pick up the phone and tell us and we will learn how to do it right – don't just fix it and process it.

Sarah Hiteman – College of Medicine to Panel:

My question is how will the panel work together to create consolidated training – the best training I received was 10 years in FSO. Yes, it is our responsibility to teach those that follow, but it doesn't help me if they just get pieces – they need the bigger picture. So the panel needs to coordinate and work together. I think from a dept perspective – it may not be popular – we need to raise the bar in departments and understand more than just processing – how do we do that?

Allison:

Thanks to Sarah for continuing to bring it up – how will we work together to provide more cohesive training.

Sarah:

As you are coming up with ideas there is a real need to know what is happening in departments – you have to spend time in the departments. There are a host of people that have started in FSO and gone out to the departments. You need to include representatives from depts..

Caroline Garcia ARL to Priscilla Cantu:

Recent financial bulletin – general adjustment – what will the process be: especially with regards to grants and contracts.

Pris:

We are meeting Wed. to discuss process and help keep “last year” from happening again.

Caroline:

Employee Link was updated with Salary adjustment and then it was backed out – pretty demoralizing to explain – if we could avoid auto adjusting it would be appreciated.

Dick Roberts:

This increase is intended for all employees – no designation on specific people. Those fund groups that don't have funds must have exception so they can delay – not ignore – but give. Caroline will represent research group.

Barb Hall to Priscilla Cantu:

PRIS – online tutorial does not take place of classroom classes – right?

You have to take the online tutorial to keep your PSOS access.

You get access immediately but it will be revoked if you don't take the tutorial.

Ted Davis, College of Science to panel:

Thanks to everyone involved who is trying to straighten the encumbrances out. I don't know why people are just figuring it out – Hopefully what Jim worked out will make them in balance.

Sandy Pottinger, College of Ag to panel:

Comment – we tried to promote all the online training to off-campus folks – please keep in mind we have off campus folks and sometimes they need the training most.

Patty: WebX is a great off-site training tool.

Eddie Camacho to Janet Hornung:

Do you have specific training for budget proposals since there are so many different variables?

Janet: Best way is to contact pre-award when you have your project ready. There is also a nice sample in the PI handbook. It can help you out with pro-rating.

Eddie: New employees need lots of help.

Janet – we do have pre-award classes but sometimes the templates torture someone for all the possibilities.

Margo: The PI handbook – is very useful for what should go in – it works really well – very useful.

Sarah – in the PI handbook does it also give any ideas about possible building in increases for personnel –

Janet – as far as what your sponsor expects they expect to see what is in your system now – not anticipated down the road – they want the current salary in PSOS now. If they call us and ask for verification it will be what's in PSOS. As far as out-years and inflation factors it will depend on program and you will discuss % you are using. There is not a standard. It is in the PI handbook – don't remember where.

Steve Holland, Risk Management to audience:

RE: HOV training – It is a state rule that a driver of any vehicle of 8-15 more passengers must have HOV training. Currently, Motor Pool enforces this rule if they rent a vehicle, however, we need your help enforcing this rule with personal vehicles.

Pat Cooper, Disability Resource Center to Steve Holland:

Hand controls – use of – is that training available through hand controls – we don't have hand control vehicles – we may have to review for reasonable access.

Joy Rogers – Arid lands to Allison Vaillancourt:

Fingerprinting – will that be only for new hires? The same positions that are designated in current policy – FBI will be performing the background checks. Business Manager won't do the fingerprinting.

Glory Novak, Human Resources.: Fingerprinting – If you are doing standard screening you can keep doing it or you can ask Sterling to do it – Fingerprinting will replace (maybe \$29.00) higher security training.

Doug Hilyard, Sponsored Projects to audience:

I bridge gap between FSO and Sponsored – biggest concern is about special rules re: how inventory is to be tagged. It is important to communicate when we are buying materials for fabrications that will eventually go to vendor. Property records are not accurate because they need info from PI's to help us tag properly the same item may get multiple tags for the different pieces that are purchased.

Katy Kearney, Museum of Art

Brand new business manager at Museum of Art – I have excellent training from offices and my former boss – but I need to learn UIS and RBC's – I trained on the how of RBCs but don't know the theories – need the global picture to understand what I am trying to do. I need a mentor on this. Need a network for business managers.

Sharon Hooven, Pathology to panel and audience:

There is an awful lot of training – including Sarah's UIS training – the training is out there but what concerns me is no one shows up...how can you get people to go... No one comes.

Kelly Grimm, Financial Services Office

I am an instructor of one of the classes – we have a lot of people sign up for classes and don't show. We also have a long waiting list, if you are no longer interested, please remove yourself from the waiting list so we know for sure how many interested people we have.

Tracy Purcell, Arizona Research Lab:

I have been here 4 years and one thing that would help me would have been a mentor that could have helped me find the right person to ask my questions, it's hard to identify who I should be talking to.

Katy Kearney, Museum of Art

Lots of mentoring in the corporate world – why can't we do that here – it would be very beneficial to newcomers. Example of CPA who knows finance – but is totally lost in UA business – CPA doesn't guarantee success at the U.

??? – UA Library to FSO:

There is one number we can call – could we have a number for departments to use for mentor questions.

Andrea Lee, FSO-Operations: We do have an FSO website staff directory – for specific numbers. We are trying to cross-train more in our area so you can be helped by everyone not just specific folks. But use our staff directory for specific number.

Sandy Pottinger, College of Ag.

For new employees – get on the web and search for answers – but first you have to know FFX, SPINS, etc. Acronym happy!

Jean Vock, College of Nursing

Next Steps – CABO/RAG – submitted proposals – what are next steps for that – as well as this panel discussion –

Mark – panelists will meet and to discuss and then we will meet with CABO/RAG.

Katy Kearney, Museum of Art

Difficult to read Investments/Endowments reports and understand how we manage the investments. Too much information from investment firm – not enough from UA.

Mark: Contact myself or Craig Barker from Foundation and Mike Treiber, UA Endowments, 621-8040

Janet Hornung, Sponsored Projects to audience re: future topics:

It might be good to look at roles and responsibilities – what do you think we do , what do you think you do.

Sarah – I agree that Roles & Responsibilities is a good topic: I want to be on equal footing here – I am in a lecture hall – I want to talk from my perspective. From your perspective you have just your area – from the perspective of this institution we have to decide how to come together and how to proceed together – for example I believe in mentorship but we have to proceed with growing our own – that's how we make it better.