UNIVERSITY of WISCONSIN
LA CROSSE

Administrative Support Workshop

August 15, 2017

Surround yourself with distinction.
Surround yourself with UW-La Crosse.

Welcome!

Joe Gow, Chancellor

Madeline Holzem, CHRO

University of Wisconsin
LA CROSSE

Academic Affairs

Betsy Morgan
Provost & Vice Chancellor

Administration & Finance Update

Bob Hetzel, Vice Chancellor

Facilities & Planning Management

Doug Pearson
Executive Director
Facilities Management

University of Wisconsin
LA CROSSE

University of Wisconsin-La Crosse

Administrative Support Workshop

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University of Wisconsin LA CROSSE

17-19 State Budget Update

- Tuition Freeze: 6 Years → FY14 to FY19
- 2% Pay Plan Each Year
  - FY18: Sept 1, 2018
  - FY19: May 1, 2019
  - UWL Cost: 684M
- Performance Funding: 26.25M Base

17-19 State Budget Update

- Innovation Fund: 5M One-time
- Financial Aid for UWS: 8M
- Veteran Non Res Tuition: 5.5M Unfunded
- Independent Audit: 2M Unfunded
- Capital Budget: 128M of 768M Request

FY18 UWL Self-Funded Compensation

Admin Support, Custodial & Facilities, HR

- 1% Base
- 1% Lump Sum

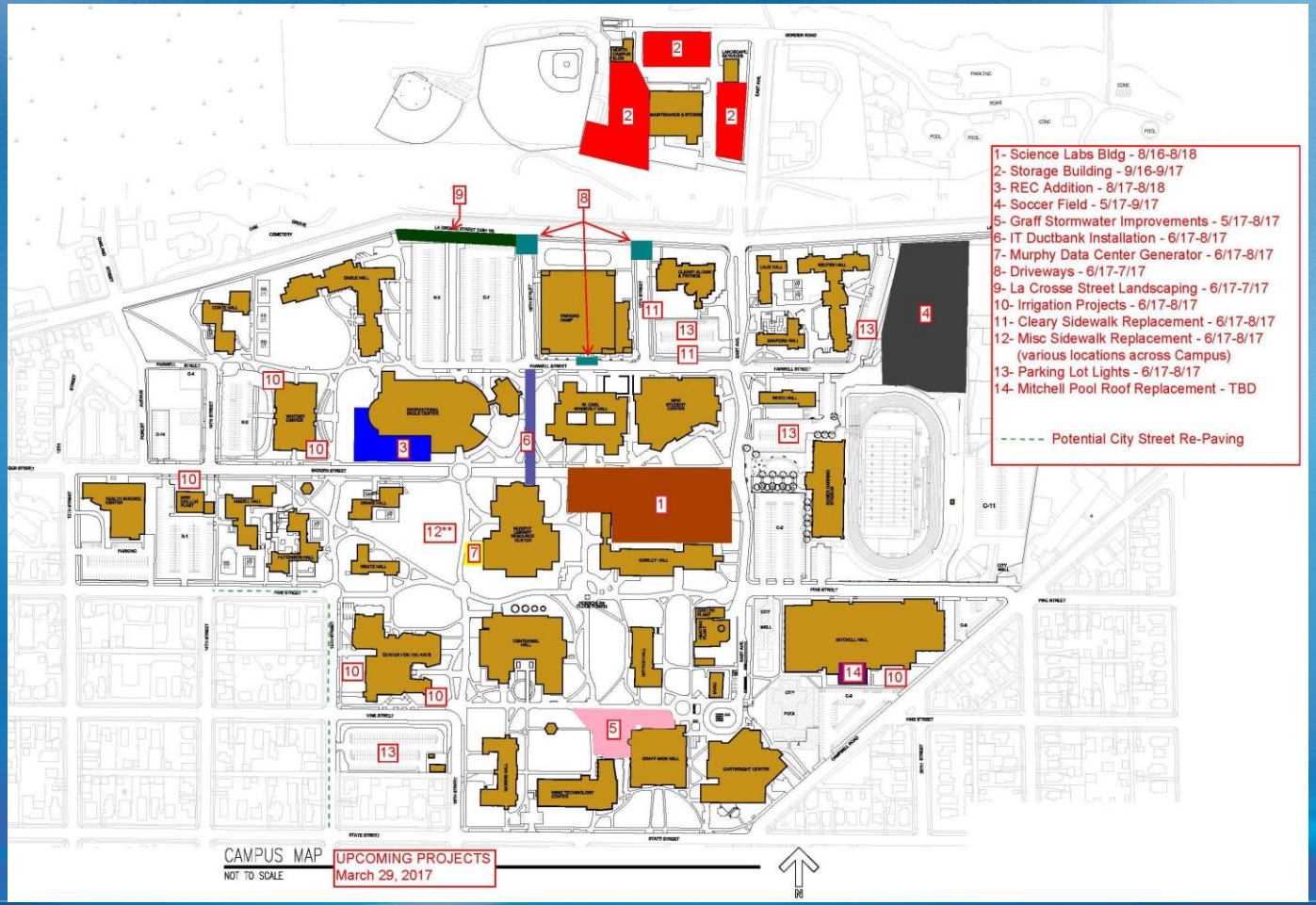
Fin Svcs, IT, Medical, Police, Power Plant

- 2% Lump Sum

University Police

- Body Cameras
- Emergency Notification
- Security Cameras
- Community Oriented Policing

Questions
&
Comments



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Facilities Planning & Management

Helpful Information - http://www.uwlax.edu/fpm/

i-Service Desk for work orders

- Dan Quam, Business Manager, 8642

General Facilities Help – 8585

Building Manager Program

- Building Managers Meeting in late September

Facilities Planning & Management

Custodial Support - Dave Anderson

- Kim Schultz-Schleibe – 8593

Enter *i*-Service Desk work order for:

- Furniture moves
- Special cleaning
- Custodial support
- Key Requests
- Card Access – Use Key Request
  - Student lists deleted every semester

Facilities Planning & Management

Confidential Records Disposal

- Containers for confidential record disposal have been strategically placed around campus to save money. No additional disposal containers will be added unless the department wants to pay for the extra container

Fire Drill

Building	Fire Drill Day	Fire Drill Time
Student Union	Thursday, September 21	7:30 AM
Cleary Center	Thursday, September 21	8:00 AM
Police Services	Thursday, September 21	8:30 AM
Maint. & Stores	Thursday, September 21	9:00 AM
Whitney Center	Thursday, September 21	9:30 AM
Cartwright Center	Thursday, September 21	10:00 AM
Mitchell Hall	Thursday, September 21	10:30 AM
Wimberly Hall	Thursday, September 21	11:00 AM
Wittich Hall	Thursday, September 21	11:30 AM
Archaeology Center	Friday, September 22	12:30 PM
Graff Main Hall	Friday, September 22	1:00 PM
Wing Technology Center	Friday, September 22	1:30 PM
Murphy Library	Friday, September 22	2:00 PM
Centennial Hall	Friday, September 22	2:30 PM
Center for the Arts	Friday, September 22	3:00 PM
Cowley Hall	Friday, September 22	3:30 PM
Morris Hall	Friday, September 22	4:00 PM

University of Wisconsin LA CROSSE

Questions
&
Comments

Parking Services Update

Parking and Transportation Services

Victor Hill, Director Parking & Transportation

Business Services

Sandy Chapman, Controller
Amanda King, Purchasing Director
Cynthia Herman, Accounts Payable Manager

OVERVIEW

- **Cash & Card Handling, Signature & Contract Authority, and Foundation/UWL**
  - Sandy Chapman, Controller
- **Purchasing and P-Cards**
  - Amanda King, Purchasing Director
- **e-Reimbursement, Travel, Payment to Individual Reports, and Invoices**
  - Cynthia Herman, Accounts Payable Manager
- **Looking Ahead**
  - Sandy Chapman, Controller

SIGNATURE AUTHORITY

- Business Services Documents
  - Change Funds
  - Expense/Revenue Transfer Forms
  - Invoices
  - PIRs (Payment to Individual Report)
  - Procurement Card Statements
  - Purchase Requisition Forms
  - Food Expense Approval Forms

CARD & CASH HANDLING

- Approval to Collect Cash and Checks
- Initial Review of Procedures
- Cash Handling Training Required
- Card Handling Training Required
- Final & Ongoing Review of Procedures

CARD HANDLING

- Comply with Payment Card Industry Data Security Standard (PCI DSS)
  - Review current process by completing a questionnaire
  - Provide policies and procedures
  - Require and document completion of Annual Security Awareness Training

PURCHASING PROCESS OVERVIEW

Determine Requirements and Anticipated Spend for desired items

Confirm whether covered under MANDATORY CONTRACT

Determine whether there is an OPTIONAL CONTRACT that can be utilized

Purchase > $5,000 – SIMPLIFIED BID

Purchase > $50,000 – REQUEST FOR BID/REQUEST FOR PROPOSAL

SPECIAL CONSIDERATIONS

PRODUCT/SERVICE	PROCESS/APPROVAL
Legal Services	Governor approval via RPA
Printing	Must work with Purchasing Office
Telecomm Equipment	Work with Telecomm Specialist
Furniture/Remodeling	Work with Campus Planning
Computer/Software/Printer/Copier	Work with ITS
Shop@UW	Check Shop@UW first for supplies
Sole Source	Approval by System/Governor
Bus, Charter Services	Obtain quote/submit Purchase Requisition
Temporary Help	Must utilize Mandatory State Contract

PURCHASES > $50,000

REQUEST FOR BID (RFB)	PROCESS ELEMENT	REQUEST FOR PROPOSAL (RFP)
Specifications	REQUEST	Outcomes
Meet Minimum Criteria, Lowest Cost	RESPONSE	Outline capabilities, Cost Considered
Lowest Responsible Bidder	AWARD	Evaluation Committee Scores (technical/cost)
Lowest Bidder on Price	NEGOTIATION	Any or all proposers prior to award
3 months	TIMEFRAME	6 months

PROCURMENT CARD (P-CARD)

- You CANNOT allow others to use your card
- Statements must be turned in timely, signed and dated, with all required supporting documentation
- Exempt from Sales Tax
- UW System Purchasing Card Policy & Procedure Manual

P-CARD RESTRICTIONS

- $5,000 single purchase limit
- Must ship items to University address
- Serial Purchasing – purchases with the same vendor for the same commodity for service without utilizing a competitive process. (PRO-C-27)
- Split Purchasing – multiple billings/charges for a single purchase to avoid the single transaction limit

P-CARD FOR SUPPLIES

- Purchase from Shop@UW first
- Must ship all items to the University
- Restrictions – Gift Cards, Flowers/Decorative items, Greeting Cards, Amazon Prime
- Ineligible vendors
- High Risk MCCs

P-CARD FOR TRAVEL

- Business-Related Travel Expenses Allowed
  - Airline Tickets
  - Lodging
  - Rental Car/Rental Car Gas
  - Hotel/Airport Parking
  - Other Transportation
  - Training/Conference Registrations
- Business-Related Travel Expenses Not-Allowed
  - Meals
  - Other Parking/Parking Fines

TRAVEL

- Travelers must submit one TER per trip.
  - The only exception to this is if additional funding would become available later in the fiscal year
- Per UW System Administrative Policy 405-General Travel and Expense, all UWL sponsored travel must be booked and purchased in the UW TravelWise program, either within Concur or with Fox World Travel.
  - This pertains to faculty, staff, students, guests, and groups.

TRAVEL

- Top 10 Things You Need to Know Before You Travel.
- Non-employees and UW travel policies.
- Fox World Travel Service Fees.
- Lodging Policy update.
- Vehicle Rental Policy update.

e-REIMBURSEMENT

- 5 Requirements for Travel e-Reimbursements.
- Q&A sessions schedule for e-Reimbursement assistance.
- Processing time for e-Reimbursement.
- e-Reimbursement friendly browser.

e-REIMBURSEMENT

- e-Reimbursements must be submitted within 90 days from the last day of travel or invoice purchase date.
- Only a traveler may assign an alternate to enter expenses on their behalf.
- e-Reimbursements are paid via a separate direct deposit and are not included in the employee's paycheck.
- e-Reimbursement trainings are posted on the Business Services home page.

PAYMENT TO INDIVIDUAL REPORT (PIR)

- All PIRs must have a contract attached if payment is for performing a service.
    - Academic Support Services Agreement (ASSA) – required for a contractor or an individual.
    - Speaking Engagement Agreement – required for an unpaid speaker.
  - All PIRs must have a current IRS Form W-9, Request for Taxpayer Identification Number, attached.

INVOICES

- To approve an invoice for payment, include the following information on the face of the invoice:
  - Funding string
  - WISDM manager signature and signature date
  - Business purpose
- UWL is tax exempt in the state of Wisconsin.

CONTRACTS

- A contract is a legally enforceable agreement between two or more parties that binds the parties to perform the mutual responsibilities, promises, and obligations described in the contract. The word "contract" may not appear in the title of the document; what matters is the substance of the document, not the title.

Procedures:

1. Department or Business Services starts a Contract Routing Form
2. Department provides contract and supporting documentation and departmental approvals
3. Contract Administrator reviews contract and either approves or follows up with contractor to get necessary modifications.
4. After approval, contract goes to appropriate authorized signer.
5. Once signed by UWL, the signature of the contractor is obtained – if contract is not already signed by contractor – and Contract is scanned into ImageNow.

CONTRACT SIGNATURE AUTHORITY

- The University of Wisconsin Board of Regents Policy 93-1 delegates the authority to sign UW-La Crosse contracts on behalf of the Board of Regents to the Chancellor of the University who, in turn, delegates contract signature authority to only a limited number of UW-La Crosse officers.

- If employees that do not have signature authority sign contracts, they may be personally liable for that contract. In addition, that contract may be held unenforceable.

LOOKING AHEAD…

- Clothing and Food Purchases
- Contract and Invoice Payment Processes
- Lunch Breaks – 2nd Tuesday of each month
- More
  - Newsletters
  - Resources on our webpages
  - Training Opportunities
  - E-Reimbursement Assistance Session
- Printing and Purchasing
- Procurement Cards
- Signature Authority
- WISDM Enhancements

QUESTIONS

Please feel free to email or call:

Card Handling – Lindsey Martell, lmartell@uwlax.edu, 785-5253
Cash Handling – Lisa Drazkowski, ldrazkowski@uwlax.edu, 785-8546
Contracts – Scott Holzem, sholzem@uwlax.edu, 785-8569
e-Reimbursement & Travel – Cynthia Herman, cherman@uwlax.edu, 785-8555
PCards – Amanda King, aking@uwlax.edu, 785-8730
Printing – John Elmer, jelmer@uwlax.edu, 785-8530
Sales Tax on Purchases – Beth Naas, bnaas@uwlax.edu, 785-8612
Shop@UW – Amanda King, aking@uwlax.edu, 785-8730, John Elmer jelmer@uwlax.edu, 785-8530
Signature Authority – Sandy Chapman, schapman@uwlax.edu, 785-8599

Break time!

10:00 – 10:15

Information Technology

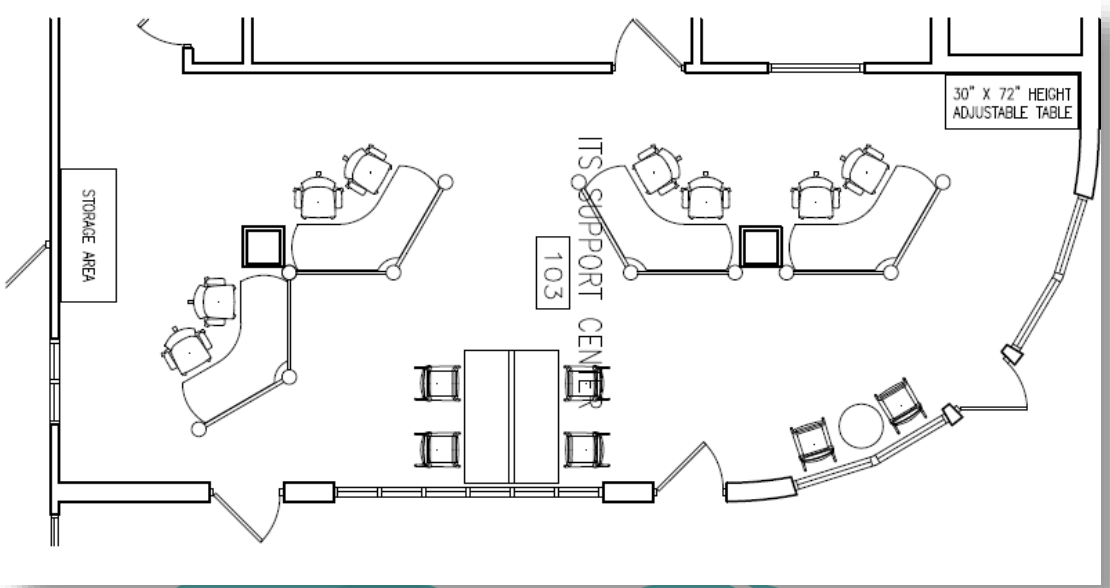
Mohamed Elhindi, CIO

Jim Jorstad, Academic Tech Services Director

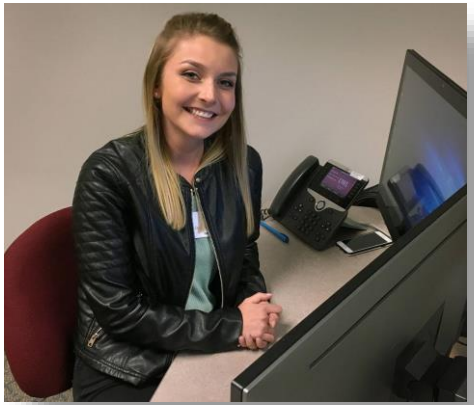
What you need to know about ITS

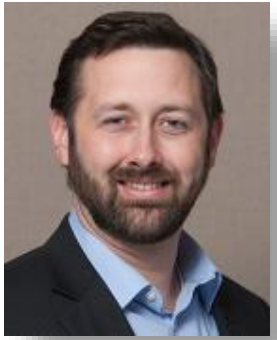
1) Introducing New Help Desk, Services, Staff
2) Communications
3) Protect yourself from phishing attacks, malware, viruses, and ransomware
4) D2L and Canvas
5) What improvements have been made in our network and access
6) Things you should know about our campus classrooms
7) Exam Scoring
8) Upgrades to ITS Web site. Understanding (KB)
9) WINGS update
10) How are we doing? Questions?

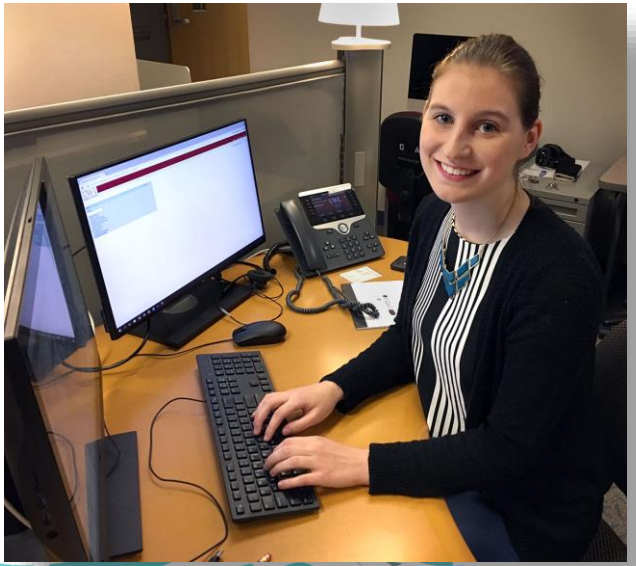
1) New Face of Eagle Help Desk



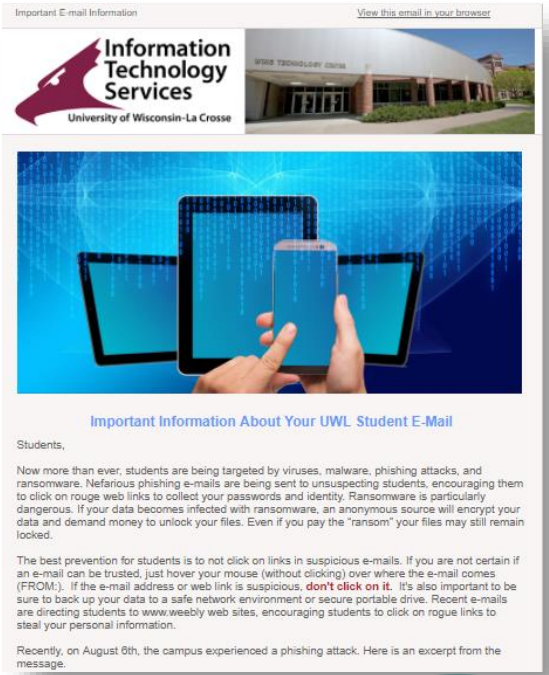
Staff







2) Being aware of communications from ITS


Important E-mail Information View this email in your browser

Information Technology Services
University of Wisconsin-La Crosse

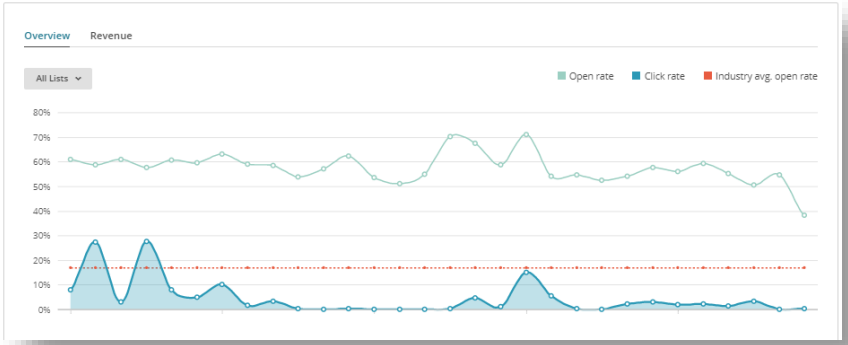
Important Information About Your UWL Student E-Mail

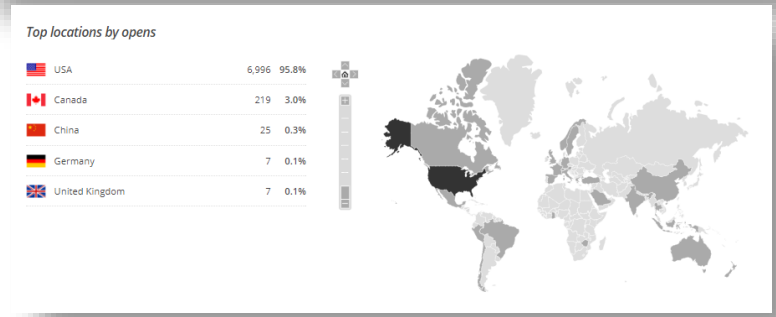
Students,

Now more than ever, students are being targeted by viruses, malware, phishing attacks, and ransomware. Nefarious phishing e-mails are being sent to unsuspecting students, encouraging them to click on rouge web links to collect your passwords and identity. Ransomware is particularly dangerous. If your data becomes infected with ransomware, an anonymous source will encrypt your data and demand money to unlock your files. Even if you pay the "ransom" your files may still remain locked.

The best prevention for students is to not click on links in suspicious e-mails. If you are not certain if an e-mail can be trusted, just hover your mouse (without clicking) over where the e-mail comes (FROM:). If the e-mail address or web link is suspicious, **don't click on it.** It's also important to be sure to back up your data to a safe network environment or secure portable drive. Recent e-mails are directing students to www.weebly web sites, encouraging students to click on rogue links to steal your personal information.

Recently, on August 6th, the campus experienced a phishing attack. Here is an excerpt from the message.





3) Protecting yourself from phishing attacks, malware, viruses, and ransomware

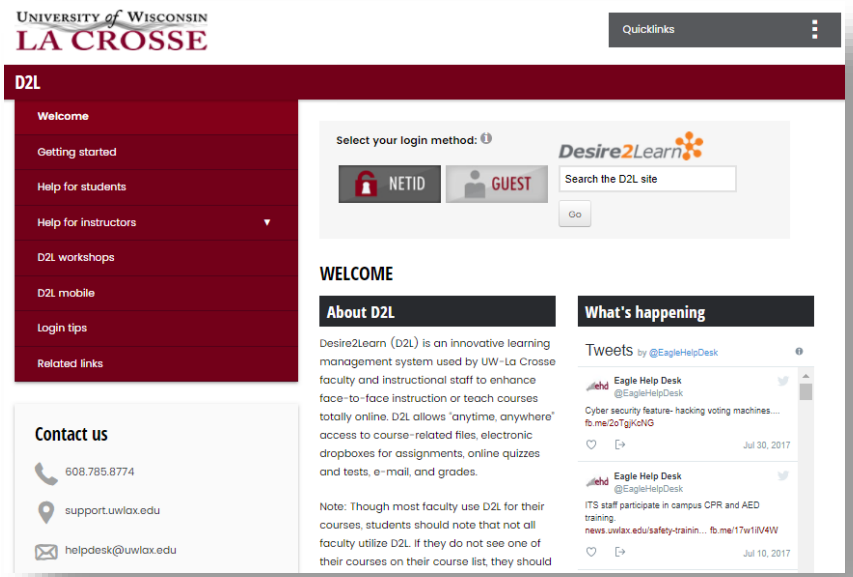
Dear UW-La Crosse
Our Mail Admin database has been breached due to the large number of spam messages we receive. For these reason our admin is currently upgrading the Mailbox Mail server
Login Here To Update Your Account
(c) UW-La Crosse 2017 Web Upgrade

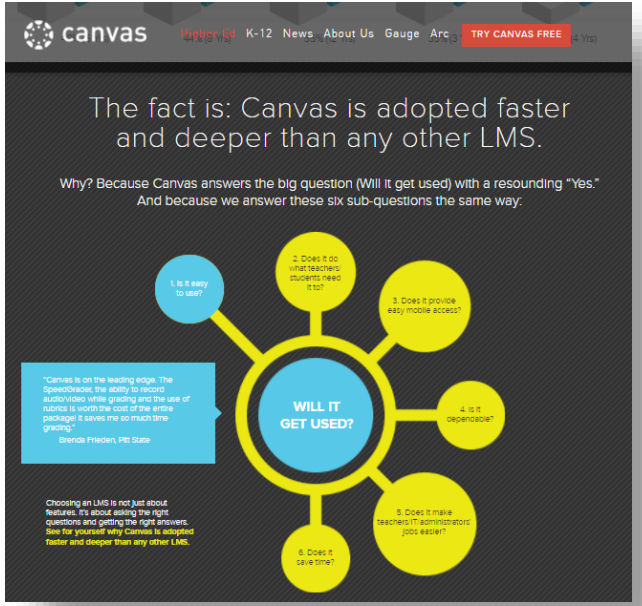
3) Protecting yourself from phishing attacks, malware, viruses, and ransomware

ITS will never ask for your password or verify your account through e-mail.

1) If you're not sure if an e-mail is a phishing attack or a valid message, don't click on it.
2) Be sure to read UWL ITS e-mails, especially when the subject line says ITS Alert or Attack. Ensure important ITS or university e-mails are not automatically going into your Junk or Clutter folders.
3) If you inadvertently clicked on a phishing e-mail and provided your user name and password, reset them immediately. You can do this by going to the Password Reset Management web page: https://secure.uwlax.edu/password
4) Check the ITS Facebook page for phishing attacks, alerts, and general technology information.
5) If you still have questions, contact the Eagle Help desk by walking in, calling, 8744, or via e-mail at: helpdesk@uwlax.edu

4) What you should know about D2L and Canvas

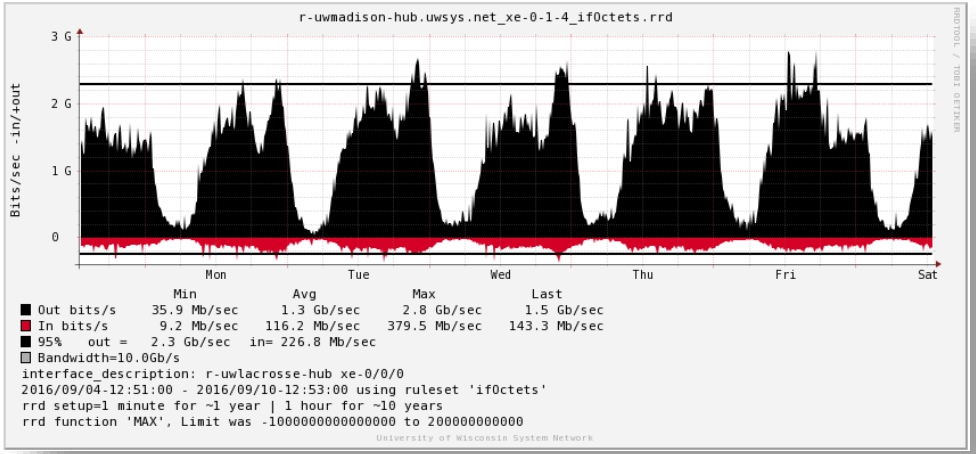


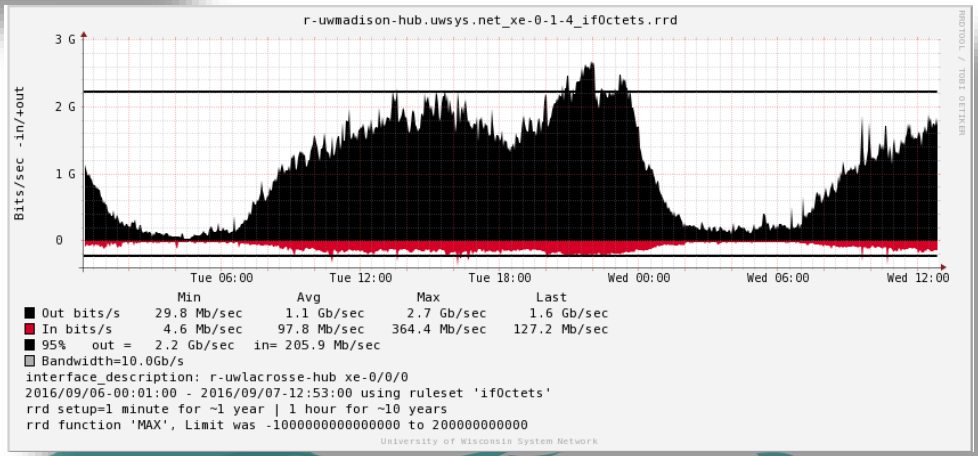


5) Network improvements

Today's "High Tech" Residents Hall

- Door Swipe (C-BORD)
- Laundry View
- Environmental Controls
- Building Automation
- Smartphone
- Smartwatches
- Roku / AppleTV / Chromecast
- PlayStation / Xbox / Nintendo
- UHD SmartTV / Lighting / Audio Devices
- Laptop / Desktop / Printers
- Digital Camera's





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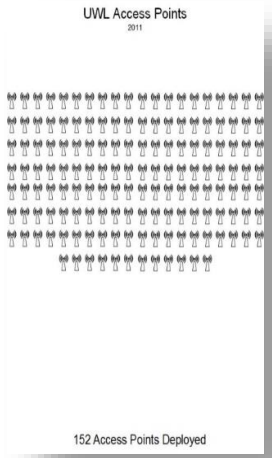
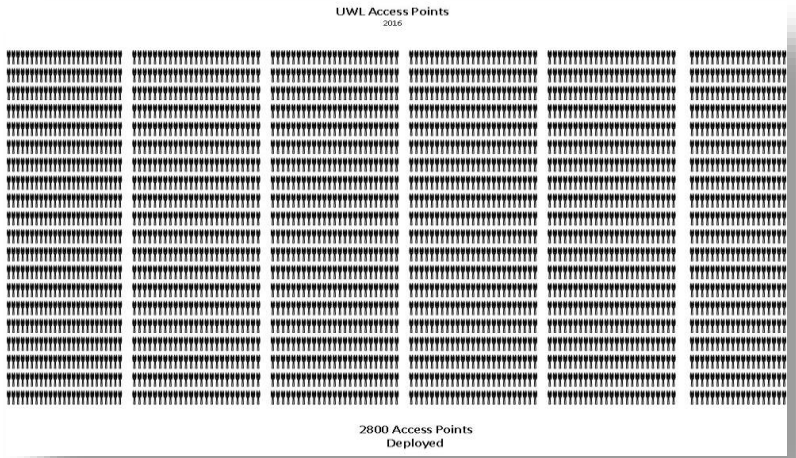
Access Point Deployment 2011-2016



152 Access Point Deployment 2011



2800 Access Point Deployment 2016

New UWL Data Center

Working towards J-Term transition from existing data center to new data center in Wing

Significant improvement to power, cooling, equipment organization

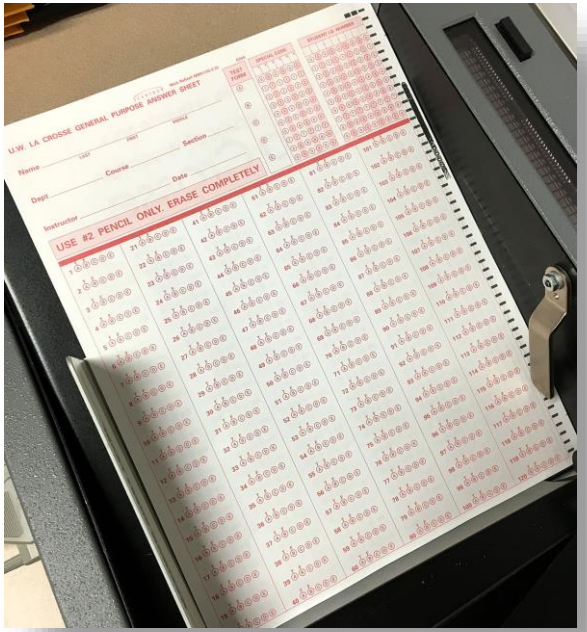
Network core refresh

4X performance existing Network

6) Campus Technology Classrooms

- Classroom Directory for detailed classroom information.
- MyMedia lecture capture is possible in any classroom.
- Classroom support can provide hands on training.
- For in-room classroom support use the phone in the room, dial 8774,and press 1 when prompted.
- Cleaning of technology podium areas.

7) exam scoring process and services



7) Exam scoring process

Place exams in a correctly identified envelope.

Give it personally to an Eagle Help Desk staff member or drop it in exam scoring bin.

Make sure your name, department, section, instructions, and exam KEY are clearly identified.

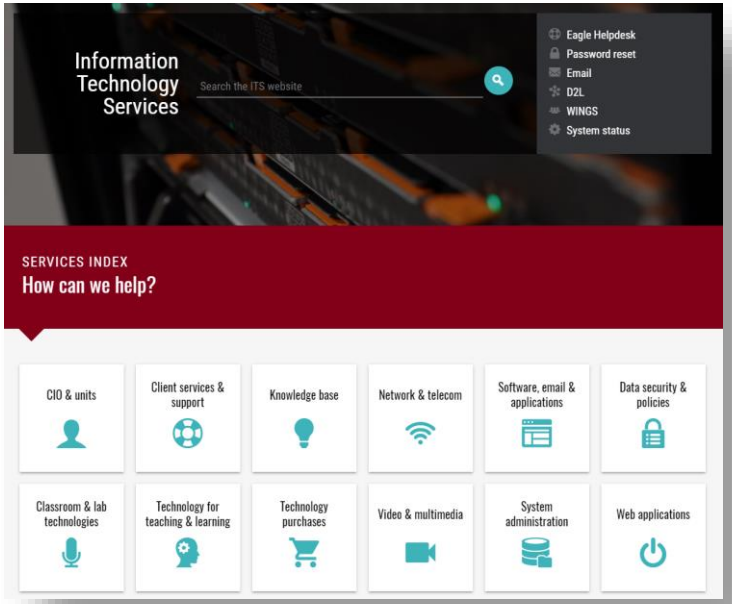
If identify exams to be scored by a specific date.

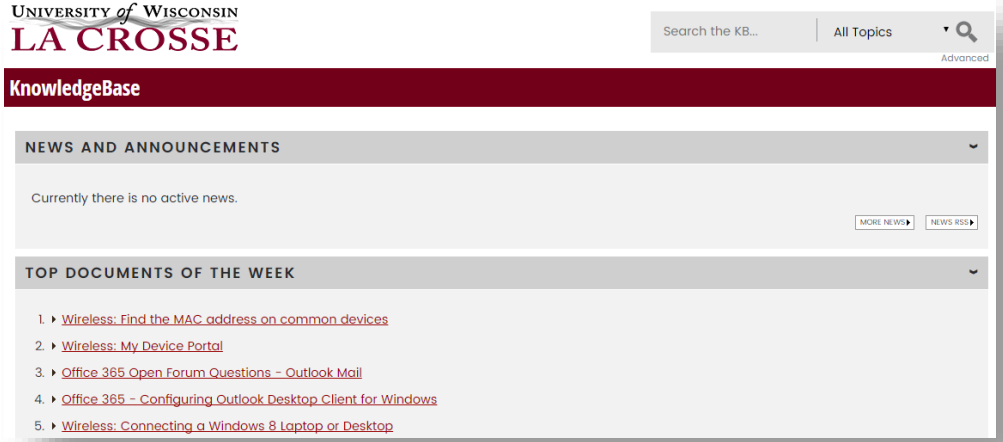
Try to avoid dropping off exams on a Friday afternoons or preceding a holiday. The earlier exams are received, the more likely they can be promptly scored.

It staff may not be available due to illness, vacation, or training. Additional delays may occur during mechanical issues.

Exam results are e-mailed to the instructor from the itsops@uwlax.edu email address.

8) Upgrades and navigation to our ITS Web site and understanding the use of Knowledge Base (KB)





https://kb.uwlax.edu

9) WINGS

Late August 2017- all authentication for WINGS will be done using NetIDs.

Nothing will change for current students, faculty, and staff. Applicants will have a new NetID created for them, but not an email address.

Also, student NetID formats will change (for new students) to: last name.4 random digits, smith.1234

10) How we are doing, and what are your questions today

Records and Registration

Jan Von Ruden, Registrar

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WHATS NEW?

- New Registrar - Jan Von Ruden
- Office reorganization – investing in our people
- New Academic Retention Policy and Drop Policy
- Ad-Astra room optimization project

OFFICE REORGANIZATION

- Registrar – Jan Von Ruden
- Assistant Registrar – Sue Knudson
- Records Information System Manager – Victoria Rahn
- Scheduling, Catalog & Curriculum Coordinator – Stephanie Speer
- New! Transcript Services/Veteran Services Assistant – Jessica Palmer

SCHEDULING AND CURRICULUM TEAM

- Stephanie Speer
  - College of Liberal Studies
  - School of Arts and Communication
  - School of Education
- Janelle Nelson
  - College of Science and Health
  - College of Business Administration

NEW ACADEMIC RETENTION POLICY

Good Standing	Warning	Probation	Suspension
Cumulative and semester GPAs ≥ 2.00	Cumulative GPA 2.00 or higher and semester GPA 1.00-1.99	Cumulative GPA less than 2.00. Probation takes precedence over warning	1. Semester GPA below 1.00 2. Failure to regain good standing after two consecutive semesters on probation 3. Failure to regain good standing the semester immediately following readmission from suspension

NEW DROP POLICY

- Students will have 10 days to drop a class without permission
  - It will not affect their academic transcript
  - They will be able to do this in WINGS

- Students will still only be able to add without permission the first five days of the term

AD ASTRA CLASSROOM OPTIMIZATION

- Meeting with each academic department/program
- Review and code requirements into the software
- Test the optimization process and tweak the rules
- Test some more
- Full utilization probably for Fall 2018 schedule of classes

OTHER INFORMATION

- Thanks for help with START!
- 2017-18 catalogs online and available through DigiCopy
- UCC/GCC timetable and catalog deadlines
- Scheduling process/timeline

SCHEDULING PROCESS/TIMELINE

- Sept 15 – Winter Intersession due to R&R
- Sept 22 – Spring 2018 schedules due to R&R
- Process remains same; contact person changed
- Importance of dates in scheduling classes/grade rosters

QUESTIONS?

Records and Registration

Human Resources

Madeline Holzem, CHRO
Amy Whillock, Assistant Director
Beth Hill, Assistant Director

Human Resources

- Position Management
- New onboarding experience
- Performance management
- ALEX
- Title and Total Compensation (TTC) Study
- Additional reminders

Position Management

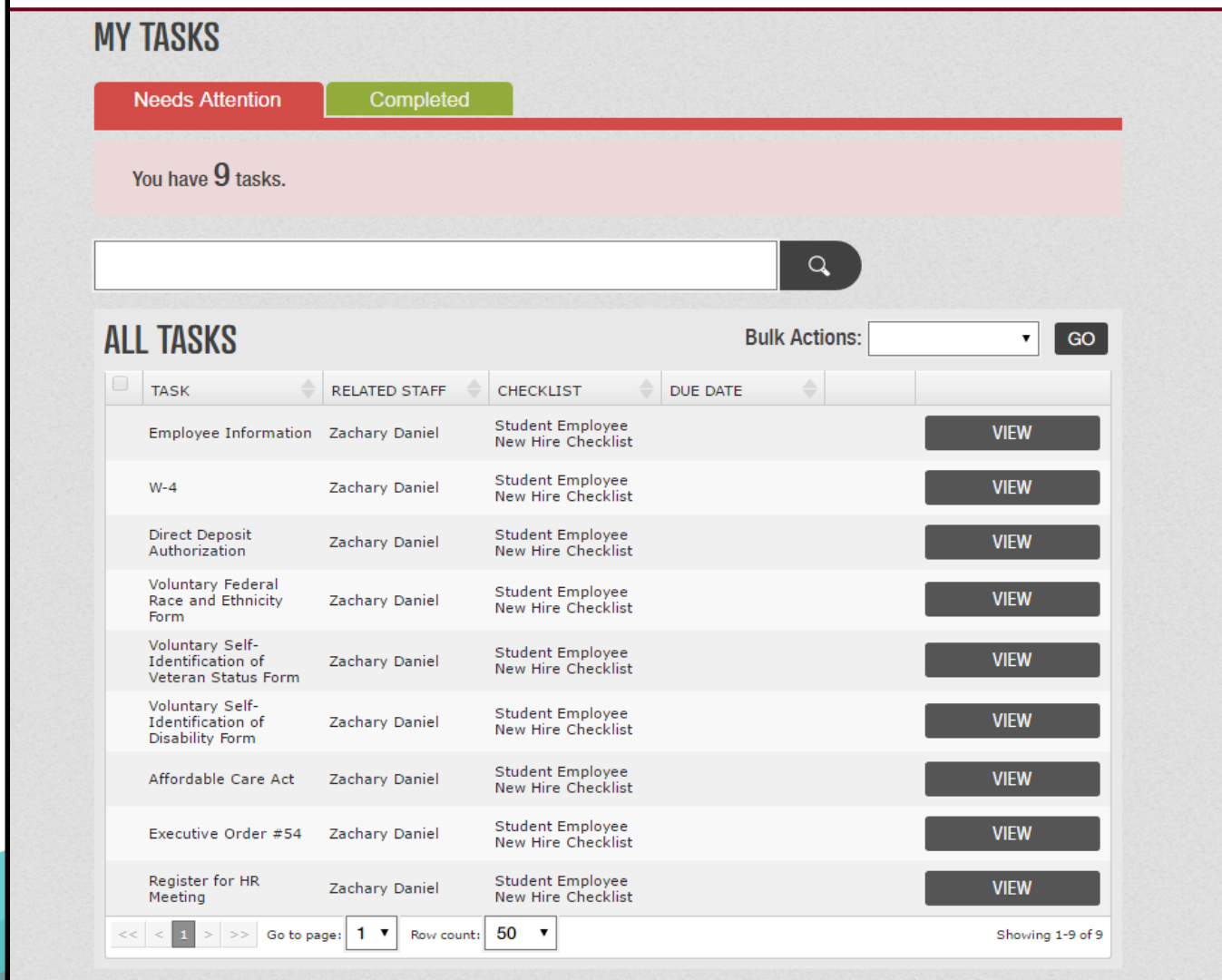
- manage a title classification & PD library,
- track changes over time,
- will help with benchmarking to CUPA,
- easily add PD to recruitments,
- allow supervisors to create new PDs and modify existing PDs, as well as
- provide justification in software versus email chains

Onboarding

- Technology and task driven
- Uniform, but unique to employee type
- Accessible 24/7
- Supervisor has dashboard to track progress
- Using for student employees since Spring and all new employees as of 8/1
- Part of the PeopleAdmin SelectSuite

Onboarding

Employee View



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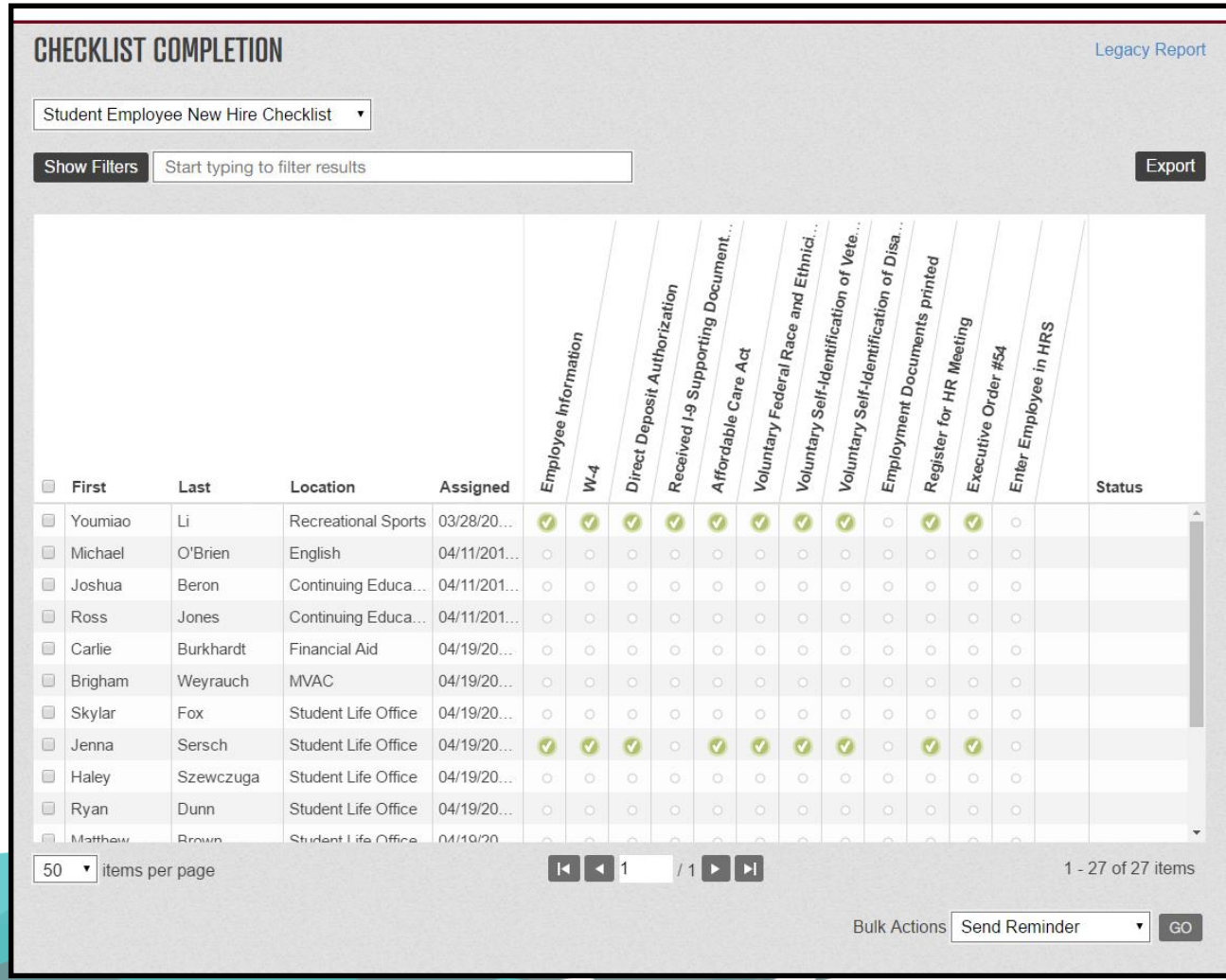
Onboarding

Supervisor Dashboard



CHECKLIST COMPLETION

Legacy Report

Student Employee New Hire Checklist

Show Filters | Start typing to filter results | Export

First	Last	Location	Assigned	Employee Information	W-4	Direct Deposit Authorization	Received I-9 Supporting Document...	Affordable Care Act	Voluntary Federal Race and Ethnici...	Voluntary Self-Identification of Vete...	Voluntary Self-Identification of Disa...	Employment Documents printed	Register for HR Meeting	Executive Order #54	Enter Employee in HRS	Status
Youmiao	Li	Recreational Sports	03/28/20...	✓	✓	✓	✓	✓	✓	✓	✓	○	✓	✓	○	
Michael	O'Brien	English	04/11/201...	○	○	○	○	○	○	○	○	○	○	○	○	
Joshua	Beron	Continuing Educa...	04/11/201...	○	○	○	○	○	○	○	○	○	○	○	○	
Ross	Jones	Continuing Educa...	04/11/201...	○	○	○	○	○	○	○	○	○	○	○	○	
Carlie	Burkhardt	Financial Aid	04/19/20...	○	○	○	○	○	○	○	○	○	○	○	○	
Brigham	Weyrauch	MVAC	04/19/20...	○	○	○	○	○	○	○	○	○	○	○	○	
Skylar	Fox	Student Life Office	04/19/20...	○	○	○	○	○	○	○	○	○	○	○	○	
Jenna	Sersch	Student Life Office	04/19/20...	✓	✓	✓	○	✓	✓	✓	✓	○	✓	✓	○	
Haley	Szewczuga	Student Life Office	04/19/20...	○	○	○	○	○	○	○	○	○	○	○	○	
Ryan	Dunn	Student Life Office	04/19/20...	○	○	○	○	○	○	○	○	○	○	○	○	
Matthew	Brown	Student Life Office	04/19/20	○	○	○	○	○	○	○	○	○	○	○	○	

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Bulk Actions: Send Reminder | GO

University of Wisconsin LA CROSSE

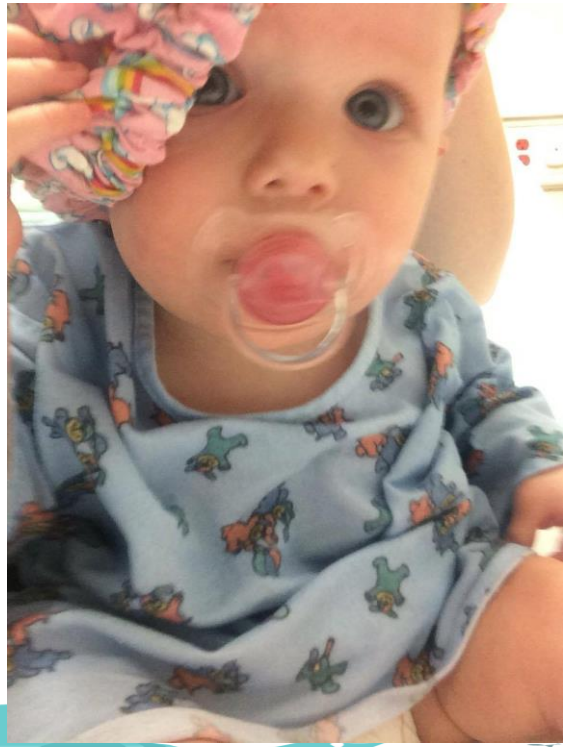
Performance Management

using PeopleAdmin SelectSuites

University of Wisconsin
LA CROSSE

ALEX

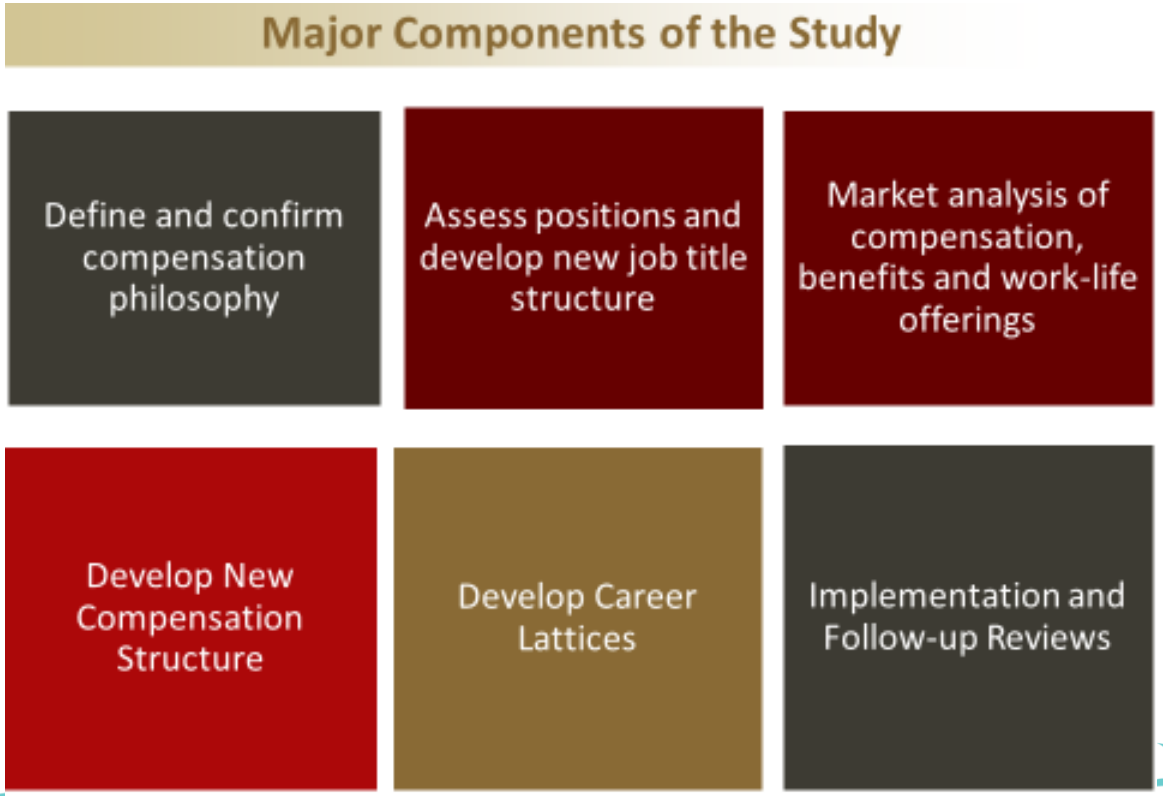
- interactive & engaging
- personalize benefits enrollment
- ETA: Open Enrollment this Fall



Title & Total Compensation (TTC) Study

Current State	Future State
Titles and functional groupings are outdated.	Titles and functional groupings reflect work performed today.
Over 1,800 job titles exist. Some job titles have many incumbents performing very different work.	Job titles provide a basis for grouping positions performing similar work.
Career frameworks are different across employee categories including career paths and requirements for progression that are not always clear.	Clearly defined career framework (spanning across all staff categories) providing helpful guidance to employees and managers.
Salary structures not based on relevant or updated market data.	Market-informed salary structures in place for university staff, academic staff, limited appointee, and graduate student positions which help to attract and retain the best and brightest talent.

TTC Study


Major Components of the Study
Define and confirm compensation philosophy
Assess positions and develop new job title structure
Market analysis of compensation, benefits and work-life offerings
Develop New Compensation Structure
Develop Career Lattices
Implementation and Follow-up Reviews

Title & Total Compensation Study

- Mercer is the vendor
- Goal to implement- 2 years
- What the Study is NOT…
  - An equity study
  - A reduction-in-force
  - A pay plan

Reminders

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GLASBERGEN
"I made a list of 100 things I need to do this week
and numbered them in order of importance.
Unfortunately, 99 are ranked #1."

QUESTIONS?

Office of Human Resources