Thanks for Your Feedback!

Comment Cards and Partners Advising Round Table Yippee
Presentations

- Microphones!
  - Presenters speak clearly into mic
  - Wireless for questions from the audience

- Like PowerPoints
  - But… don’t read them

- Thanks!
  - You’re doing a good job of communication and helping us
  - Overall meetings are very informative and we appreciate your time and efforts
Format

- Like Accounting/Financial information at beginning of the Round Table
- Information/Roses near the end
- Want more Q&A and Input
  - Please ask Subject Matter Experts questions. Even about items not being presented on that day. If we need to research, we will get back to you and the Business Partners with an answer.
- Appreciate Reminders about upcoming deadlines and meetings
General

- Give more gift cards
  - #1 – Sorry, our budget is limited like yours
- Coffee Service?
  - See #1
- When will you serve Breakfast or Lunch?
  - See #1
- Provide information earlier
  - We will do our best; but, we do post by day of meeting
- Give BPRT information to Chairs/Faculty
  - We invite them and include them in BMSS emails
  - Have requested to present Travel to Chairs
Sharing

- CBA places applicable travel, textbooks and other policies & procedures (modified to meet department needs) on their website for faculty. Very useful to new staff/faculty.

- Like the “In-the-Spotlight”
  - Example given was Derek’s evaluation labels
  - Volunteers?
Travel Questions

- For actual expenses submitted for reimbursement up to the max of $55/day why reference “per diem” in the policy for travelers to question/reference?

- “Per diem” terminology is NOT used for Continental US travel. Actual meal amounts up to daily cap ($55). See Section V – Subsistence Expenses, B – Meals While Traveling
  - The reimbursement of daily meal and incidental expenses for travel within the continental United States will be based on actual amounts incurred subject to the daily maximum reimbursement cap set forth in Appendix C, page 43. *The meals reimbursement cap should not be treated as a per diem. The definition of Meals and Incidental Expenses Reimbursement Cap may be found in Appendix A, Definitions. Expenditures above the cap are the responsibility of the traveler unless a documented exception is approved.*
More Travel Questions/Suggestions

- Travel training for approval officials should be mandatory. *Looking into it*
- Want strong message from the top to Faculty/Deans about travel compliance.
  - Presented to President’s Cabinet
  - Presented at University Administrative Council
  - Asking to present to Department Chairs
- Would like a Travel Office for faculty
  - Please have faculty or staff call the subject matter experts in AP/Travel for assistance before or after
  - Current CSU Policy puts the travel compliance responsibility with the Approving Official
Understand rules & policies; but, sometimes need something out of the ordinary. Please work with us to get it done/processed/paid.

◦ Please call one of the Financial Services Managers
  • While we can’t break the law or subject the University to audit findings, we can sometimes find another way to legally reach your goal.

List of names/offices of who to call for different questions pertaining to Accounting

◦ Working on a FAQ List to Post … in the meantime, see next slide for Managers and Supervisors
Manager & Supervisor Numbers

Justine Heartt, AVP Financial Services 87461
Kendal Chaney-Buttleman, University Controller 84679
LaVerne Simmons-Barnett, Dir. Accounting Services 87009
Susan Johnson, Director Accounts Payable & Travel 87444
John Guion, Director Procurement & Contracts 85860
Dale Clack, Procurement Supervisor 87405
Thurman Watson, Property & Receiving Supervisor 86015
Gina Curry, Director SFSC & University Bursar 87433
Elena Larson, Assistant Director SFSC/Collections 86845
Caryl Vickers-Harper, Assistant Director SFSC/Cashier 86559
Dawn Cooper, Supervisor SFSC/Cashier 87806

Stacy Hayano, AVP Budget and Planning Administration 83909
Norman Kwong, Budget Supervisor 87452
Angel Thayer, Budget Supervisor 87458
IRT Questions

- Is there a list of campus software “expert” for distribution?
  - No list but we will work with staff on a one-to-one basis to understand the need and to try to find a resource to meet the need.
    - All staff training is performed through the Faculty Staff Resource Center (FSRC) in ARC 3012. ATCS offers classes. The students who staff the FSRC are all trained to answer basic and intermediate Microsoft Office questions. Service Center staff will meet with any staff member to learn about specific needs and then find a match with an “expert” who can help out. We often have student staff who are “experts” in software and they can work directly with staff.
IRT Questions

- How do FIN SVC:SACVAULT “Power Users” get more access? How do we get licenses for Query Studio?


    The form includes a standard “Reporting Access” option for which users can select “GL Reporting All” access. This option provides standard, department level access to financial data in Cognos.

  - Use the “Other Roles/Special Instructions” box to request a specific type/level of access or report that doesn’t appear as a standard option on the form. If you have a special need that is not covered in the Other Roles/Special Instructions section, you can always consult directly with Teresa Palmer at palmert@csus.edu or Kendal Chaney-Buttleman at kendalcb@csus.edu. FS/BPA/IRT can help meet your need.
IRT Questions

- Can IRT provide training on electronic filing or backing-up of all office communication and office records?
  - This would be something the FSRC could help with. Currently, we would consult with you to understand your need and then prepare some training to meet your need, if we are able to do so. The training would be custom for your needs.

- Is there a way to sync the campus deadline calendars to load the dates automatically on Outlook calendars?
  - There is currently no plan to implement this type of feature. This would be a very technically difficult task that would take a lot of man hours to complete.
Future Topics

- Foreign Travel Insurance
  - Scheduled for October BPRT

- Delegation of Authority

- Invite Others to Present Again
  - HR, Payroll, Reprographics, Facilities, Receiving, Sustainability, Risk, etc.

- UEI about their business processes
  - They have trainings
    - Fundamentals of Project Administration in spring
    - UFSS Introductory and Review Trainings in spring
    - Contact your Account Administrator for specific help

- Cross-collaborations to meet strategic goals

- Campus Accessibility
What’s Next

- Use the Feedback to Continue to Improve
- Fall survey to assist in planning BPRT meetings
- Solicit continuing Feedback from You, our Business Partners
- Thanks!