Staff Retreat
July 25, 2012
Schierman's Event Center

Attending: Pam Bell, Lynne Kittner, Vanessa Dobbins, Lori Mulalley, Brenda McGuire, Holli Sampson, Cathy Knock, Jamie Anderson, Mary Schierman, Cheryl Chamber, Joleen Joslin, Jory Shelton, Debbie Rigby, Brenda Haener, Linda Kisha, Julie Haar, Candy Ihm, Lorraina Swayne, Cynthia Jette.

Steve Hollenhorst will be leaving. Discussion regarding his replacement will occur at the first Leadership meeting.

Meeting will focus mostly on fiscal processes

Fiscal office protocol has changed, and they are implementing a program with a "cradle to grave" style. Each contract specialist has a specific group and runs processes and proposals from beginning to end. Personnel has not been fully worked out.

Pam has asked Troy Hall to come up with a standardized letter for grad student request and proposals.

Dean Pregitzer is moving forward with monitors and upgrades for room 200 with a video conference package and 65-inch LCD tv. Rooms 203, 108, 102 and 25 are all getting projectors, 203 has a large whiteboard already delivered.

A directory monitor for the first floor has been requested.

Debbie ordered the new PolyCom. UI as a whole is considering VOiP (Voice Over Internet Protocol) and this new system will also work with VOiP.

Amie-June and Tyler have resigned from Taylor Ranch, and they've been gone since July 12. Lynne, Dennis, Jory, Bruno have all been in to attend to processes and facilities. Donors will arrive via pack ride and aircraft August 6, 2012 and leave August 10, 2012. There has been lots of activity with students and research.

Lynne Kittner will be moving into the Dean's suite, into 201B.

Communications/Marketing person, Jill Maxwell starts July 31. Will be located in Carrie Barron's old office.

Intolerance has been an issue, and CNR has had an incident. Dean Pregitzer will not tolerate this behavior, and it will not be condoned even in a joking manner. Through the process of resolving this issue Pam has learned about Safe Walk, a program available to staff and students.

Classified and IH:

Employees MUST record their time. “Booking time” is illegal. Booking time is “I’ll take those four hours off when I go on vacation”. If you put in 45 hours, you get paid for the overtime (IH). Classified extras go into a comp time bank. All overtime requires prior approval. Overtime without permission could be a terminable offense. Permission comes from supervisor. State funds funded employees need to talk to Pam.

Mandatory hour break beginning with the Academic Year. Problems to be discussed regarding extenuating circumstances. Concerns should go to Kurt.

Cathy Knock spoke about basic email courtesy:

Are you being correct, concise, are you answering questions?

Subject lines are important.

If the subject of the email has changed, change the subject line of the email instead of

Re:re:re:re: Subject lines are not searchable

If you haven’t upgraded to Office 2010, Cathy recommends because of the conversation sorting function and increased search capabilities.

Include your signature, who you are, what your title is, your phone and what your email address is for external uses. Standardize signatures. Include email in signature in case of forwarding.

Do not assume that someone knows what you’re talking about.

Write short emails, straight to the point.

Jamie and Cathy are working on standard verbiage for announcing missing information in accounts receivable. Wording of this standard might not be necessary once the process behind Purchase Cards has been decided.

Cathy requests that the only information listed in the missing information email are the actual missing transactions, not a full transaction report.

Joleen asked: Should we send notifications when the transactions are 30, 60, 90 days old? When do we send them?

All fiscal emails NEED to come to cnrfiscal@uidaho.edu and will be distributed or answered from there by Joleen or Michael. Faculty should not cc their fiscal representative on these emails as it results in a repeat email.

Discussion began regarding scanned receipts:

> If you update to Office 2010, you can set up a template to scan the receipt and send the thing to fiscal, and have the receipts stored on your email locally. Jory is working on a how-to.
>
> Faculty are upset that they have to add more information to receipts, but the reason is in case of an audit. "Sharpies for field supplies to write on collection bags" is the kind of description needed for Fiscal.
>
> All scanned receipts need to go to cnrfiscal@uidaho.edu, and will be distributed from there to the appropriate person.

Discussion regarding "the box": Pam decided that all receipts should be handed to the first available employee in fiscal rather than put in the receipt box where they may get shuffled around and lost.

Problem: People are mixing personal card items with Purchase Card items on reimbursements. ACTION ITEM: Jamie put process in place to receive receipts?

DAILY OPERATIONS

Phones need to be answered by the third ring in both the Fiscal Office and the Dean's Suite.

Out of office messages are a must, share your calendars, Vanessa will send a directory through Outlook.

Out of state waivers: go with supervisor and individual CNR Fiscal point-person.

NEW TRAVEL SYSTEM

Enhancement travel system will be similar to claim voucher, upload documents to travel voucher, might replace e-trips. Release date: tentatively Aug 20. Jamie will email handout and video to anyone on the P Card list. Electronic signature lines, Jamie doesn't have all the details. Hopefully it will save step, and it will all filter into Banner. May have some issues with blanket trips.

Action Items
Jamie: to find out how AR wants signatures. Scanned? Scanned, signed and then scanned again? Electronic signatures? Travel/Pcard? Make faculty sign a form that we can keep on file?
Remind people that they can set up direct deposit for pcard reimbursments.

Jory: send out "how to" scan documents in reference to email
Set auto reply on cnrfiscal@uidaho.edu with timelines for replies and reminders not to cc point person?

Pam: remind staff/faculty that fiscal requires 3 days to respond to any email, any question, and remind on Dean Pregitzer's email about cnrfiscal time limits.
Come up with list of what goes to fiscal email rather than to their person.
Find out who's going into 17 and 17D?

Holli: CNR fiscal website or additions to Links for Staff and Faculty. Lynne is point.

Vanessa: send information on how to forward a phone, pickup a phone on a group, etc.