

I-9 Compliance: Wes Matthews shared information on efforts to improve compliance campus-wide with I-9 requirements for new employees. A memo was released to members of the President's Cabinet and Provost's Council announcing:

To bring the university into full compliance, effective Aug. 1, 2018, an assessment of \$1,000 will be charged to departments for each instance when a new employee does not complete the Form I-9 on or before the first day of work. Any assessments will be charged quarterly to the appropriate vice president or dean.

Preparing for Banner 9: Brian Borchers explained the timeline for Banner 9 implementation and answered questions. If you haven't already visited the ITS site on this project, please do so at this link: <https://support.uidaho.edu/TDClient/Portal/Desktop/Desktop?Q=KGLXLHUr9~ZGdZ1jblQ4Grm7K6M319PLhLBuzX7GUUnVdE9tRD41JQ>

There you will find details about the timeline, and useful resources. Please begin to prepare yourselves for the changes. While functionality won't change, the user interface will be considerably different and will take some time to get comfortable with it. Go Live is scheduled for Oct 1st.

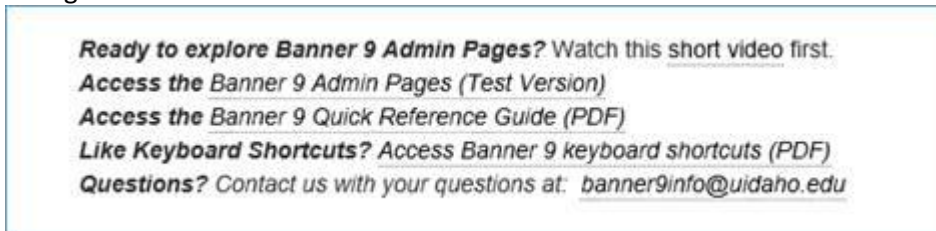


Chart V Process for Requesting Changes to Index or FOAPAL Elements: Please use the new online form when requesting such changes. The form will direct the user to the New Index form, if needed, based on how the user answers questions on the form. Access the form on the General Accounting page under Helpful Links – Chart V Index Change Request <https://www.uidaho.edu/finance/controller/general-accounting>

Banner Resource Page Update: The page has been updated. Please note the training video for employees who missed the live Chart V training in May or June, and for new employees hired this summer/fall until the suite of Banner Finance training modules have been updated for Banner 9 and Chart V.

Update on Banner / Argos Reports: Just an update to let you all know that we are making progress but it is a big job. We have a consultant working on Argos reports and ITS is modifying Banner reports. More updates as we have them.

VandalWeb for Non-Finance Users: Gathered feedback on use of these queries. Some are Banner-delivered and others are UI custom. Linda Campos will gather a small team to discuss in more detail and develop recommendations.

Travel Authorization Exception Reporting: The group appeared to agree with the recommendation that these reports – monthly or quarterly (TBD) – should be distributed to the unit/college fiscal officers. The reports will provide the names and assigned departments for employees who are flagged as traveling before a travel authorization is completed in TravelWeb. More information to be distributed next week.

Service Agreements: Julia requested feedback from the group on how many delegated to PIs or faculty the responsibility for entering new service agreements.

Sharing Best Practices:

- I'm attaching the Excel tools that Joe Christensen, College of Business and Economics, shared with the group. These work best if you have Macro's enabled when you save the file.
- I'm attaching the notes from Trina Mahoney's sharing of tips on how the common Finance forms: FGIBDST, FGIBAVL, FGIBDSR behave with Chart V. Please note that Trina added the FGIBDSR notes subsequent to the CUIBO meeting, so those are new on this attachment – on the last page.