ADA and Administrative Workshop

Hosted by: Division of Business Affairs

August 24, 2017

8:30 AM – 3:30 PM

University of Wisconsin
Stevens Point

Vice Chancellor Kristen Hendricksen

WELCOME!

Paul Hasler, Director of Facility Services

Tina Kramer, Business Manager

EVENT PLANNING AND FACILITY SERVICES

University of Wisconsin
Stevens Point

UWSP Facility Services

- Department Work Units:
  - Auto Shop
  - Central Stores
  - Custodial
  - Grounds
  - Heating Plant
  - Mail Services
  - Maintenance
  - Purchasing
  - Recycling
  - Surplus Property
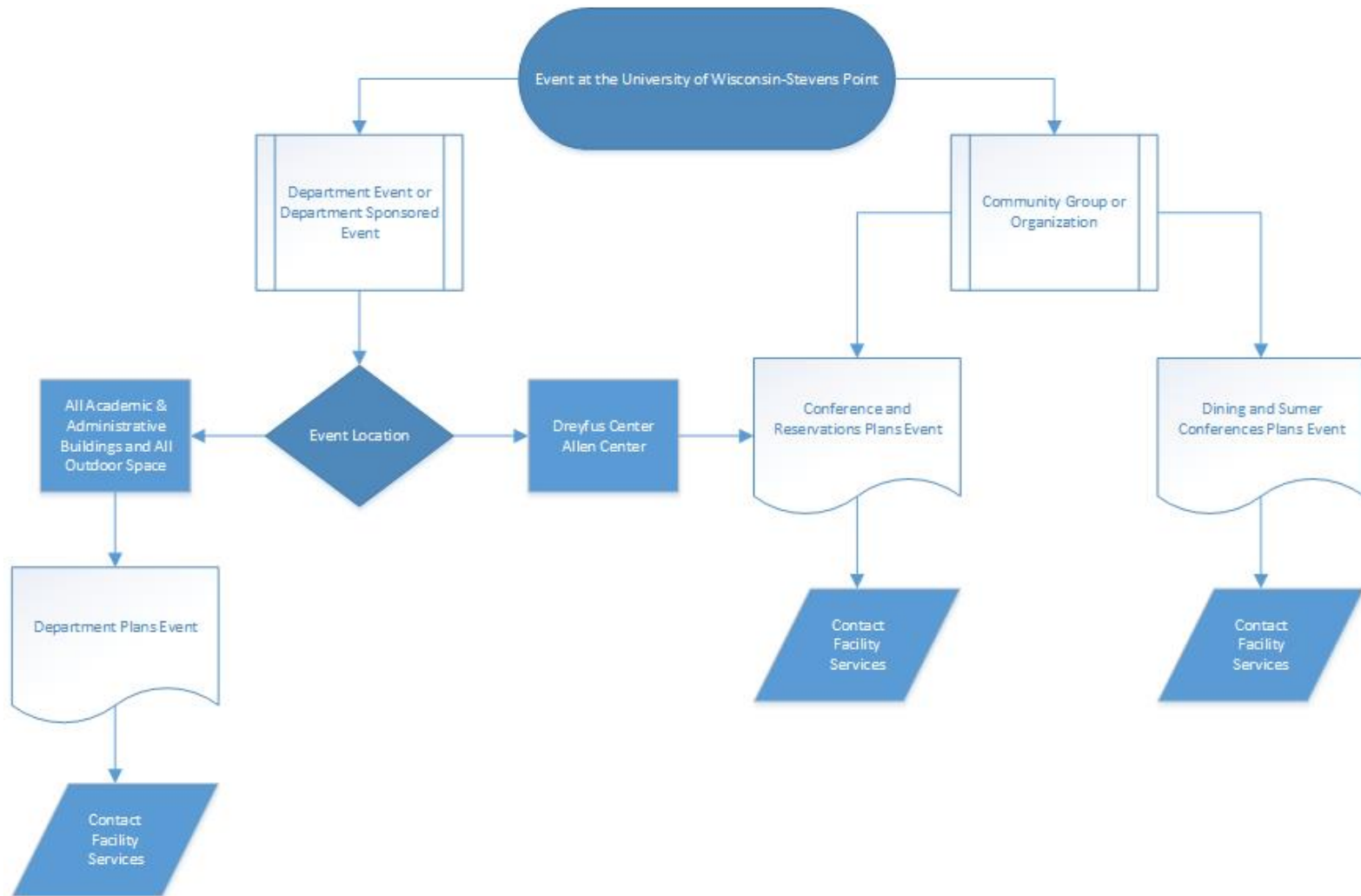 - Transportation
  - Web TMA
  - Work Control Center

Mission Statement: Advancing the academic mission through craftsmanship, artistry, and exceptional service.

Facility Services
Academic and Administrative Building Events

Overview of Building 1:1 Meeting

4 years of Building 1:1 Meetings

– http://www.uwsp.edu/facsv/Facility%20Linkable%20Documents/Building%201-on-1%202017.pdf

Contact Facility Services
Ext. 4219, Monday-Friday 7am to 10 pm
Facility.Services.Office@uwsp.edu

Submit a Work Order
http://workrequest.uwsp.edu/facilities/home.html

Carl Rasmussen, Director of Facilities Planning

CAMPUS BUILDINGS AND DIMS

Locating Campus Floor Plans, Evacuation Plans, and Maps

Carl Rasmussen

UWSP Dir. Facilities Planning

Building Plans

Proposed Chemistry Biology Building - Construction complete late 2017
Move-in spring/summer 2018 - First Classes Fall 2018

Building Plans - All Docum... ✕

File   Edit   View   Favorites   Tools   Help

UWSP receives national a...   doodle easy scheduling   Best of the Web   Channel Guide   Internet Explorer News   Internet Start   Microsoft   Suggested Sites ▾   Web Slice Gallery ▾

Library Tools

Site Actions ▾   Browse   Documents   Library

University of Wisconsin Stevens Point

Campus ▷ Building Plans ▷ All Documents

Facilities Planning Home

Libraries
- Shared Documents
- Building Plans
- Campus Maps
- Evacuation Floor Plans
- Building Profiles

Lists
- Building List
- Calendar
- Tasks

Discussions
- Team Discussion

Forms

- Recycle Bin
- All Site Content

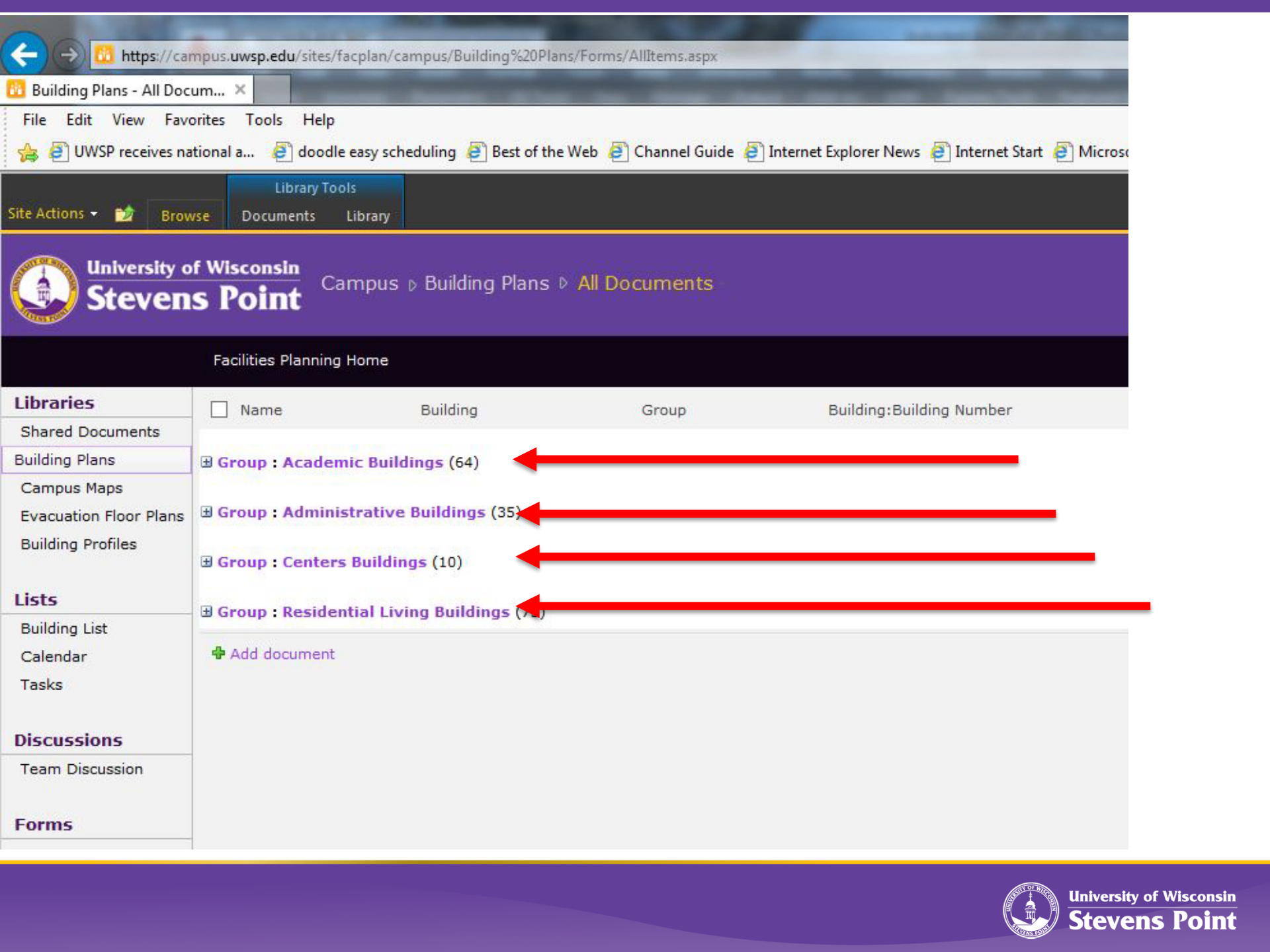| ☐ Name	Building	Group	Building:Building Number	Building:Buildi
⊟ Group : Academic Buildings (64)				
⊟ Building : Albertson Hall (9)				
Albertson Hall Lower Level 9.13.16	Albertson Hall	Academic Buildings	8	ALB
Albertson Hall 1st Floor 9.13.16	Albertson Hall	Academic Buildings	8	ALB
Albertson Hall 2nd Floor 9.13.16	Albertson Hall	Academic Buildings	8	ALB
Albertson Hall 5th Floor 9.13.16	Albertson Hall			ALB
Albertson Hall 7th Floor 9.13.16	Albertson Hall			ALB
Albertson Hall Roof Plan 09.13.16	Albertson Hall			ALB
Albertson Hall 3rd Floor 5.15.17	Albertson Hall			ALB
Albertson Hall 4th Floor 6.21.17	Albertson Hall			ALB
Albertson Hall 6th Floor 6.21.17	Albertson Hall			ALB

Open Document   ✕

❓ You are about to open:
       Name: ... 1st Floor 9.13.16.pdf
       From: campus.uwsp.edu

How would you like to open this file?
   ⦿ Read Only
   ○ Edit

[OK]   [Cancel]

Some files can harm your computer. If this information looks suspicious, or you do not fully trust the source, do not open the file.

- ⊞ Building : Chemistry Biology Building (8)
- ⊞ Building : College of Professional Studies (6)
- ⊞ Building : Collins Classroom Center (6)
- ⊞ Building : Communication Arts Center (6)
- ⊞ Building : Health Enhancement Center (3)
- ⊞ Building : Noel Fine Arts Center (4)
- ⊞ Building : Schmeeckle Reserve Visitor Center (4)
- ⊞ Building : Science Building (6)
- ⊞ Building : Trainer Natural Resources Building (7)
- ⊞ Building : Waste Education Center (3)
- ⊞ Building : Wood Utilization Lab (2)
- ⊞ Group : Administrative Buildings (35)
- ⊞ Group : Centers Buildings (10)

University of Wisconsin Stevens Point

110
IT Computer Lab

C111   V110
C110
M110 Men
W110 Women
S101
V101
C102
102 Storage
S102
C103

104E
Reference

Food for Thought Cafe

101C Custodial
101D

108
Study Room

107
Meeting Room

101E
Museum Display

101
Commons

103
Access Services Desk

104
Study

S105

105A
Museum of Natural History

106C
Museum of Natural History

C106

105

103B
Office - ILL

103A
The Idea Studio

103D
Inter-Library

103C
Office ILL

106B
Museum Store

C105

C104

104A
Office Access Serv

104B
Office Librarian

104C
Office Reference

104D
Reference Studio

106
Museum of Natural History

106A
Office Director

S104
V102
S103

Elev

Drawn: Angie Henschel
Date: 09/12/16
UWSP Facilities Planning

Albertson Hall

First Floor

Bldg No: 0008

N

https://campus.uwsp.edu/sites/facplan/campus/Building%20Plans/Forms/AllItems.aspx

Building Plans - All Docum... ✕

File   Edit   View   Favorites   Tools   Help

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Library Tools

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University of Wisconsin
Stevens Point

Campus ▷ Building Plans ▷ **All Documents**

Facilities Planning Home

Libraries

Shared Documents
Building Plans
Campus Maps
Evacuation Floor Plans
Building Profiles

Lists

Building List
Calendar
Tasks

Discussions

Team Discussion

Forms

Recycle Bin
All Site Content

☐ Name	Building	Group	Building:Building Number	Building:Building Abrev
⊟ Group : **Academic Buildings** (64)				
⊟ Building : Albertson Hall (9)				
Albertson Hall Lower Level 9.13.16	Albertson Hall	Academic Buildings	8	ALB
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⊞ Building : Waste Education Center (3)				
⊞ Building : Wood Utilization Lab (2)				
⊞ Group : **Administrative Buildings** (35)				
⊞ Group : **Centers Buildings** (10)				
⊞ Group : **Residential Living Buildings** (75)				

Evacuation Floor Plans - All... ✕

File   Edit   View   Favorites   Tools   Help

⭐ 🔲 UWSP receives national a...   🔲 doodle easy scheduling   🔲 Best of the Web   🔲 Channel Guide   🔲 Internet Explorer News   🔲 Internet Start   🔲 Micr

Site Actions ▾ 📝   Library Tools
                Browse   Documents   Library

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Stevens Point   Campus ▷ Evacuation Floor Plans ▷ All Documents

Facilities Planning Home

Libraries

☐	Type	Name	Building	Group	Building:Building Numb

Shared Documents

Building Plans   ⊞ **Group : Academic Buildings** (40)

Campus Maps

Evacuation Floor Plans   ⊞ **Group : Administrative Buildings** (19)

Building Profiles
                         ⊞ **Group : Centers Buildings** (7)
Lists

Building List   ⊞ **Group : Residential Living Buildings** (52)

Calendar

Tasks   ➕ Add document

Discussions

Team Discussion

Forms

🗑 Recycle Bin

📄 All Site Content

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Site Actions ▾   Browse   **Library Tools**
                                    Documents   Library

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Stevens Point

Campus ▷ Evacuation Floor Plans ▷ All Documents

Facilities Planning Home

Libraries
Shared Documents
Building Plans
Campus Maps
Evacuation Floor Plans
Building Profiles

Lists
Building List
Calendar
Tasks

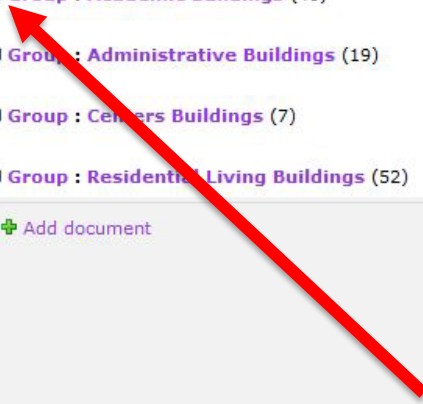**Discussions**
Team Discussion

Forms

Recycle Bin
All Site Content

☐	Type	Name	Building	Group
		Group : Academic Buildings (40)		
		⊞ Building : Albertson Hall (7)		
		⊞ Building : College of Professional Studies (5)		
		⊟ Building : Collins Classroom Center (4)		
	🅰	CCC First Floor Emergency Plan 2016	Collins Classroom Center	Academic Buildings
	🅰	CCC Second Floor Emergency Plan 2016	Collins Classroom Center	Academic Buildings
	🅰	CCC Third Floor Emergency Plan 2016	Collins Classroom Center	Academic Buildings
	🅰	CCC Fourth Floor Emergency Plan 2016	Collins Classroom Center	Academic Buildings
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		⊞ Building : Health Enhancement Center (2)		
		⊞ Building : Noel Fine Arts Center (3)		
		⊞ Building : Schmeeckle Reserve Visitor Center (4)		
		⊞ Building : Science Building (4)		
		⊞ Building : Trainer Natural Resources Building (5)		
		⊞ Building : Waste Education Center (1)		
		⊞ Building : Wood Utilization Lab (1)		
		⊞ **Group : Administrative Buildings** (19)		
		⊞ **Group : Centers Buildings** (7)		
		⊞ **Group : Residential Living Buildings** (52)		

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https://campus.uwsp.edu/sites/facplan/campus/Evacuation%20Floor%20Plans/CCC%20First%20Floor%20Emergency%20Plan%202016.pdf

campus.uwsp.edu

File   Edit   Go to   Favorites   Help

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1 / 1   109%

UWSP Emergency Plan

Arrows Denote Building Evacuation Routes.
Shaded Areas Represent Tornado/Severe Weather Shelter Areas.
Shelter Areas Are Located On Floors 1 and 2 Of This Building.

WHAT TO DO DURING:

FIRE
Pull a fire alarm and EVACUATE the building in the event of a fire. Before opening a door, feel if it is warm. If it is warm, leave the door closed and find an alternate path. Stay low if you encounter smoke. Stop, drop, and roll should your clothes catch fire.

EVACUATION
Remain calm. Use stairs and not elevators. Pay close attention to your surroundings as you exit. Incidents such as FIRE or HAZARDOUS MATERIALS RELEASES may require that alternate paths be selected. Stay clear of the building and entry ways after exiting the building in order to facilitate responder access to the emergency.

TORNADO/ SEVERE WEATHER
Notification of severe weather will be relayed to the building. If a siren sounds, building occupants should take cover in the lowest safe location available, preferably in an interior room or basement. Remain in your shelter area until tornado warning is expired.

KEY

- YOU ARE HERE
- EMERGENCY PHONE
- AED (Located on 1st floor)
- SEVERE WEATHER/ TORNADO SHELTER (Located on 1st and 2nd Floors)
- EVACUATION ROUTES

Call 911 for all Emergencies.
There will seem to be a 10 second delay, but STAY ON THE LINE!

Meet first responder for directions.

See UWSP Emergency Management Plan at http://www.uwsp.edu/rmgt for details on all emergencies.

Contact Protective Services at (715)346-3456 for additional questions.

EXIT   EXIT   EXIT   EXIT   EXIT   EXIT

S101   102   104   106   108A   108B   108C   108D   114   116   S102
108F   108   108E
V101   C102   V102   EXIT
101B   109   111   118A   W118
101   C101   101A   113   118   C103   E120   120   M120   118B
127   125
C104
V104   132   130A   130   130B   130D   128   126   124   122   V103
130C
S104   S103
EXIT   EXIT
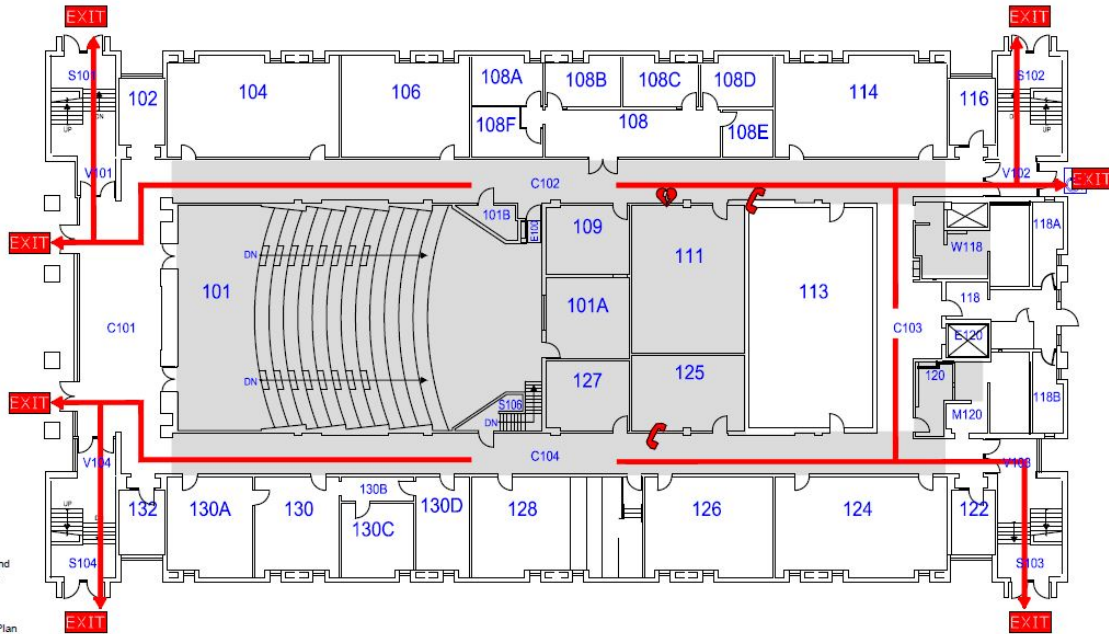
Drawn: Angie Henschel	Joseph V. Collins Classroom Center	Bldg No: 0007
Date: 11/15/16		
UWSP Facilities Planning	First Floor Emergency Plan	

University of Wisconsin Stevens Point

https://campus.uwsp.edu/sites/facplan/campus/Evacuation%20Floor%20Plans/Forms/AllItems.aspx

Evacuation Floor Plans - All... ✕

File   Edit   View   Favorites   Tools   Help

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Site Actions ▾   📄   Browse   Documents   Library

University of Wisconsin
Stevens Point

Campus ▷ Evacuation Floor Plans ▷ **All Documents**

Facilities Planning Home

Libraries

Shared Documents
Building Plans
Campus Maps
Evacuation Floor Plans
Building Profiles

Lists

Building List
Calendar
Tasks

Discussions

Team Discussion

Forms

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	📕	CCC First Floor Emergency Plan 2016	Collins Classroom Center	Academic Buildings
	📕	CCC Second Floor Emergency Plan 2016	Collins Classroom Center	Academic Buildings
	📕	CCC Third Floor Emergency Plan 2016	Collins Classroom Center	Academic Buildings
	📕	CCC Fourth Floor Emergency Plan 2016	Collins Classroom Center	Academic Buildings

⊞ Building : Communication Arts Center (4)

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⊞ Building : Noel Fine Arts Center (3)

⊞ Building : Schmeeckle Reserve Visitor Center (4)

⊞ Building : Science Building (4)

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⊞ Building : Waste Education Center (1)

⊞ Building : Wood Utilization Lab (1)

⊞ **Group : Administrative Buildings** (19)

⊞ **Group : Centers Buildings** (7)

⊞ **Group : Residential Living Buildings** (52)

University of Wisconsin
Stevens Point

DIMS

Updates and
Room Change Requests

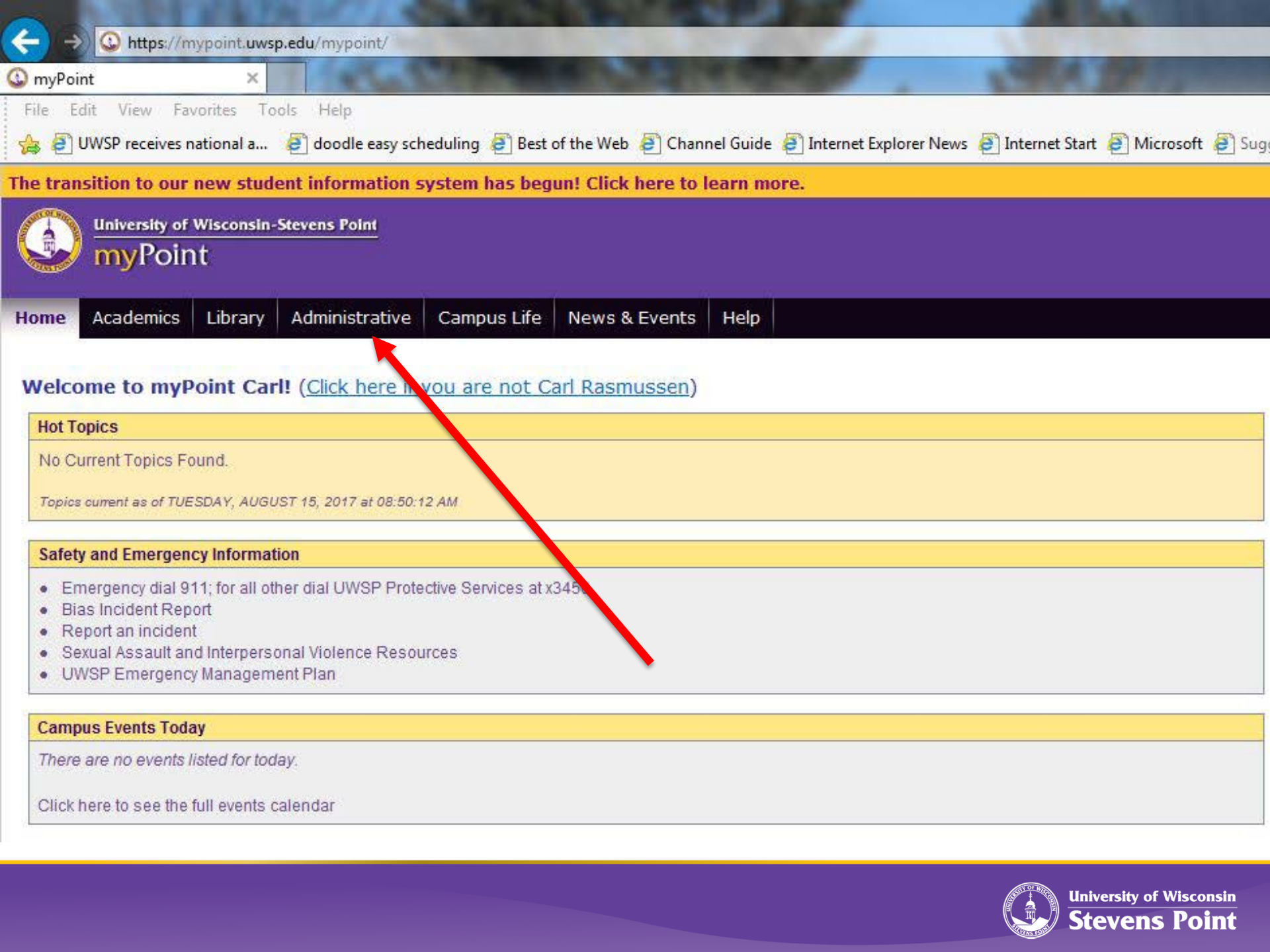# DIMS
???

DIMS
???

Department Information Managers System

https://mypoint.uwsp.edu/mypoint/default.aspx?t=41

myPoint

File   Edit   View   Favorites   Tools   Help

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The transition to our new student information system has begun! Click here to learn more.

University of Wisconsin-Stevens Point
myPoint

UWSP | Web Email | Find People | Calendar

Home | Academics | Library | **Administrative** | Campus Life | News & Events | Help

Travel
- Travel Expense Report (TER)
- Payment Services/Travel Forms
- UWSP Travel Card
- UW System Traveler's Reference Guide, "Before You Go"
- Request a Campus Vehicle
- UW TravelWIse Portal for Business Travel
- Payment Services/Travel homepage

Business & Facilities Services

Events Management System
- Browse Reservations on Campus
- Request a Room Reservation on Campus
- View UWSP Calendar of Events

Facility Services
- Facility Services homepage

General Ledger
- General Ledger Home
- Active Department IDs
- Wisconsin Data Mart (WISDM)

Payment Services
- Payment Processing Procedures & Guidelines
- Payment Order Form
- Payment Services/Travel homepage

Printing & Design
- Printing & Design homepage

Purchasing
- Office Supply Catalog
- Central Stores Ordering
- Software and Hardware Purchasing
- Surplus Property
- Purchasing Requisition Form
- Purchasing Card (P-Card) Program
- Contracts

Safety & Loss Control
- Risk Management
- Environmental Health & Safety
- UWSP Emergency Management Plan

Telephone Support
- Telephone Support Office homepage
- UWSP Cellular Phone Program

UWSP Administration
- Office of the Chancellor
- Office of the Provost & Vice Chancellor for Academic Affairs
- Student Affairs
- Business Affairs
- UWSP Foundation
- Diversity, Equity & Affirmative Action
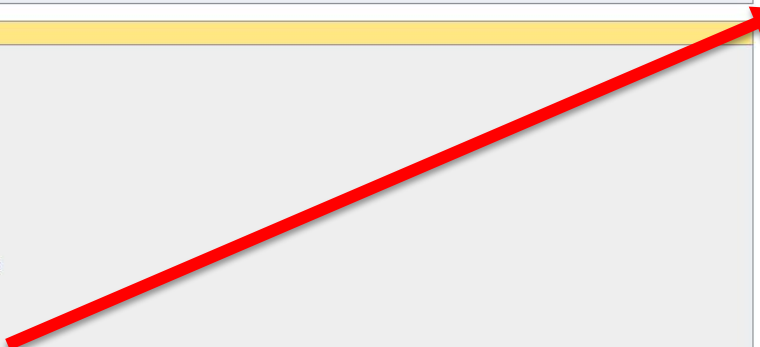
Work Orders
- Facility Services Work Request System
- IT Work Order System

Personnel & Payroll
- My UW System (Earning, Leave, and Benefit Statements)
- Employee Self Reporting System (ESRS)
- Department Information Managers' System (DIMS)
- Classified Staff Timesheet- Permanent & Project
- Classified Staff Timesheet- LTE
- Personnel Information/Forms
- Personnel Resources For Faculty/Academic Staff
- University of Wisconsin System Budget Redbook
- View Staff Benefits

Faculty/Staff Computing Services
- myFiles - Network Storage for Faculty/Staff
- Change Password
- View/Change ID Questions
- Information Technology(IT) Help Desk
- Teaching, Learning & Technology
- IT Work Order System
- Computer Labs Information
- Computer Lab Reservation Requests using EMS
- Wireless Access
- Request for Network Software
- Information Technology Policies
- Information Technology homepage
- Lynda.uwsp.edu - On-line Training Videos
- Office 365 Portal

University Governance
- Common Council
- Academic Staff Council
- University Staff Council
- University Handbook
- Community Rights & Responsibilities

University Notices and Policies
- Community Rights & Responsibilities
- Dean of Students Office Policy and Procedures
- Email Policy
- Environmental Health & Safety Policies
- Information Technology Policies
- Institutional Review Board
- Lab Reservation Policy
- Parking Procedures & Regulations

Stevens Point

myPoint   Waiting for mypoint.uwsp.e... ✕

File   Edit   View   Favorites   Tools   Help

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Windows Security

The server campusinfo.uwsp.edu is asking for your user name and password. The server reports that it is from uwsp.edu.

User name

Password

☐ Remember my credentials

OK   Cancel

University of Wisconsin Stevens Point

https://mypoint.uwsp.edu/ps/ps013/default.aspx

myPoint   Dept. Information Manager... ×   ESRS

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A new student information system is coming soon! Click here to learn more.

University of Wisconsin-Stevens Point
Dept. Information Managers System

Facilities Planning

| Manage Dept. Info. | Manage Identities | Manage Roles | Change Department | Find Person |

DEPARTMENT INFORMATION	Request Change or Verify Department Full Name
Department Full Name	Facilities Planning
Department Abbreviated Name	Facilities Plan
Department Short Name	FACPLAN
Department Manager	Rasmussen, Carl
Department Email Address	FacilitiesPlanning@uwsp (example: Info ch@uwsp.edu)
Department Phone	(715) 346-2781 (example: (XXX) XXX-XXXX)
Department Fax	(715) 346-2447 (example: (XXX) XXX-XXXX)

Update Department Information

Rooms In Department (Please contact Facilities Services to change Room Descriptions)   Request Room Description Change.

Select	Building	Room	Room Description	Department Use	Room Type
☐	M & M	0125B	PLNNG DIRECTOR		
☐	M & M	0135	PLAN ROOM		
☐	M & M	0125A	ASSOC PLANNER		
☐	M&M Addn 2	0125	FACILITIES PLAN		Main Office

Add/Edit Rooms in Dept   Update Department Use   Delete Selected Rooms

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Stevens Point

myPoint | Dept. Information Manager... × | ESRS

File   Edit   View   Favorites   Tools   Help

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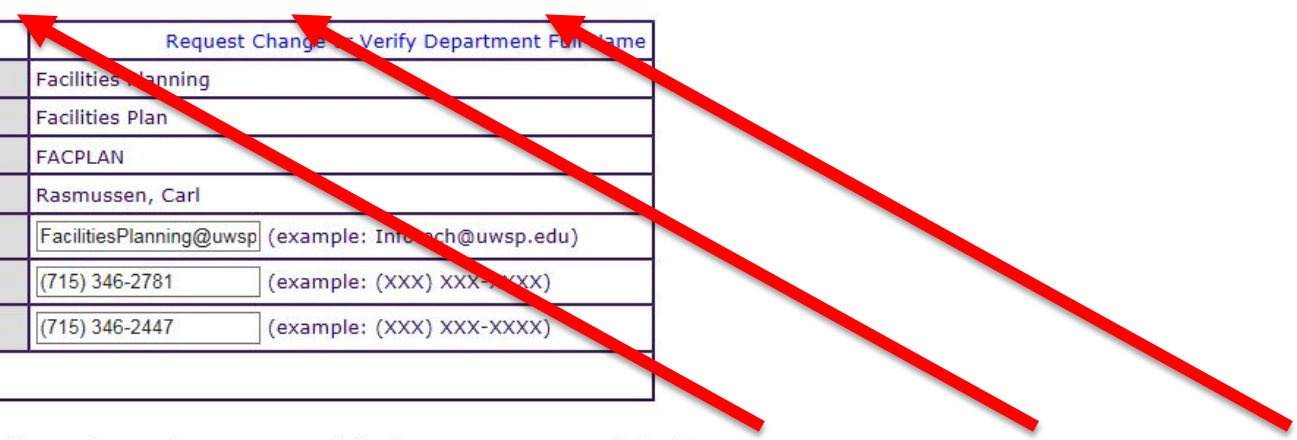
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DEPARTMENT INFORMATION	Request Change or Verify Department Full Name
Department Full Name	Facilities Planning
Department Abbreviated Name	Facilities Plan
Department Short Name	FACPLAN
Department Manager	Rasmussen, Carl
Department Email Address	FacilitiesPlanning@uwsp (example: Infotech@uwsp.edu)
Department Phone	(715) 346-2781 (example: (XXX) XXX-XXXX)
Department Fax	(715) 346-2447 (example: (XXX) XXX-XXXX)

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☐	M & M	0125B	PLNNG DIRECTOR		▼
☐	M & M	0135	PLAY ROOM		▼
☐	M & M	0125	ASSOC PLANNER		▼
☐	M&M Addn 2	0125	FACILITIES PLAN		Main Office ▼

Add/Edit Rooms in Dept   Update Department Use   Delete Selected Rooms

https://mypoint.uwsp.edu/ps/ps013/default.aspx

Results - allen   Webpage has expired   ESRS   Site Index - About UWSP | UWSP   myPoint   Webpage

File   Edit   View   Favorites   Tools   Help

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University of Wisconsin-Stevens Point

Dept. Information Managers System

myPoint

Facilities Planning

Add / Edit Rooms In Department

Select a building

Building:

. : Select One : .
601 Division
601 Division addn
ALB
ALB-1
Allen Center
BUILDING 26
Baldwin Hall
Burroughs Hall
CAC
CCC
CPS
Carpenters Shop
DUC
DUC ADDITION 4
DUC Addition 1
DUC Addition 2
DUC Addition 3
DeBot Center
DeBot Center addn
Delzell Hall
Delzell Hall addn 1
Delzell Hall addn 2
Geo. Stien Annex
HEC
HEC (MAC)
HEC (Quandt)
HEC Addn 3 (Mil Sci)
Hansen Hall
Heating Plant

Back to

University of Wisconsin
Stevens Point

Dept. Information Managers System

Facilities Planning

Add / Edit Rooms In Department

Select a building

Building: M & M

Select Room(s)

Select	Room	Dept Phone	Dept Fax	Description	Department Use
☐	0100 - GROUNDS EQPMNT			GROUNDS EQPMNT	
☐	0100 - ROOF			ROOF	
☐	0100A - SMALL EQUIPMENT			SMALL EQUIPMENT	
☐	0101 - AUTO MECHANIC			AUTO MECHANIC	
☑	0101A - AUTO SHOP OFFIC			AUTO SHOP OFFIC	
☐	0101B - SECONDARY ELECT			SECONDARY ELECT	
☐	0101C - PRIMARY ELECT			PRIMARY ELECT	
☐	0102 - MECHANICAL ROOM			MECHANICAL ROOM	
☐	0103 - STAIRWAY			STAIRWAY	
☐	0103 - GROUNDS STORAGE			GROUNDS STORAGE	
☐	0104 - STAIRWAY			STAIRWAY	
☐	0104 - GRNDS/CUST SPRV			GRNDS/CUST SPRV	
☐	0104A - GRNDS INTERN			GRNDS INTERN	
☐	0105 - CORRIDOR			CORRIDOR	
☐	0105 - IRRIGATION EQPM			IRRIGATION EQPM	

[Update Department Rooms] [Back to Department Information]

University of Wisconsin
Stevens Point

Noel Fine Arts Center

Second Floor

University of Wisconsin
Stevens Point

LEE SHERMAN DREYFUS
UNIVERSITY CENTER (40)
FIRST FLOOR PLAN
DRAWN BY SW   DEC 2006
UPDATED BY SW   MAY 2007

SCALE IN FEET
0   10   20   30   40

myPoint | Dept. Information Manager... × | ESRS

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Update Department Information

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Select	Building	Room	Room Description	Department Use	Room Type
☐	M & M	0125B	PLNNG DIRECTOR		▾
☐	M & M	0135	PLAN ROOM		▾
☐	M & M	0125A	ASSOC PLANNER		▾
☐	M&M Addn 2	0125	FACILITIES PLAN		Main Office ▾

Add/Edit Rooms in Dept   Update Department Use   Delete Selected Rooms

University of Wisconsin
Stevens Point

myPoint | Dept. Information Manager... ✕ | ESRS

File   Edit   View   Favorites   Tools   Help

UWSP receives national a... | doodle easy scheduling | Best of the Web | Channel Guide | Internet Explorer News | Internet Start | Microsoft | Suggested Sites ▾ | Web Slice Gallery ▾
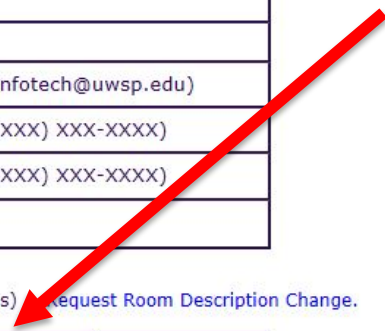
A new student information system is coming soon! Click here to learn more.

University of Wisconsin-Stevens Point
Dept. Information Managers System

Facilities Planning

| Manage Dept. Info. | Manage Identities | Manage Roles | Change Department | Find Person |

DEPARTMENT INFORMATION	Request Change or Verify Department Full Name
Department Full Name	Facilities Planning
Department Abbreviated Name	Facilities Plan
Department Short Name	FACPLAN
Department Manager	Rasmussen, Carl
Department Email Address	FacilitiesPlanning@uwsp (example: Infotech@uwsp.edu)
Department Phone	(715) 346-2781 (example: (XXX) XXX-XXXX)
Department Fax	(715) 346-2447 (example: (XXX) XXX-XXXX)

Update Department Information

Rooms In Department (Please contact Facilities Services to change Room Descriptions)   Request Room Description Change.

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☐	M&M Addn 2	0125	FACILITIES PLAN		Main Office ▾

| Add/Edit Rooms in Dept | Update Department Use | Delete Selected Rooms |

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DIMS
Updates and
Room Change Requests

Carl Rasmussen

UWSP Dir. Facilities Planning

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HR Staff

GENERAL HR, ONBOARDING, BENEFITS, AND PAYROLL

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Human Resources/Affirmative Action

Hiring/Onboarding, Payroll, Benefits, Training and Development, Performance Management, Employee Relations and Employment Law Compliance

Tom Bertram and Anna Golackson, Lisa Schaufenbuel

RECRUITING AND ONBOARDING

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Recruitment

- Where to Find Forms
  - www.uwsp.edu/hr
    - "Recruitment"
      - Recruitment/Hiring Process

- Criminal Background Checks
  - Timely
  - Supervisor/Account
  - Normal processing time

Recruitment

- Where to Find Forms
  - www.uwsp.edu/hr
    - "Recruitment"
      - Recruitment/Hiring Process

- Criminal Background Checks
  - Timely
  - Supervisor/Account
  - Normal processing time

Lisa Schaufenbuel

PERFORMANCE MANAGEMENT

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Recruitment

- Where to Find Forms
  - www.uwsp.edu/hr
    - "Recruitment"
      - Recruitment/Hiring Process

- Criminal Background Checks
  - Timely
  - Supervisor/Account
  - Normal processing time

Julie Hayes

BENEFITS

Benefits

Resources

- Where to find Resources
  - www.uwsp.edu/hr
    - Benefits

**FMLA, ADA,
Benefits Questions**

- Employee's have rights under FMLA and ADA
- Refer to the Benefits Specialist any time someone has benefits or leave questions

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Lisa Nelson and Tina Rajski

PAYROLL AND COMPENSATION

Time Reporting and Payroll Reminders

Process Information Timely

Resources are available on the website

Start Dates are Important

Communicate when Approvers Change

- Comp Adjustment Workflow
  - Contact HRAA prior to completing the form
  - Effective Date
  - Resources are available on HRAA's website
    - Employee Relations
      - » Policies

PAFs

- Paper Forms
- Fill out as completely as possible
- Any changes to appointments should come through on PAFs
- Timely Processing

Lisa Schaufenbuel

OFFBOARDING

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Resources

Materials are on the HRAA Website

   Organizational Development > Offboarding

Refer people to the website as soon as you know

Links are sent out when HRAA notified via resignation letter

BREAK

Anna Golackson and Lisa Schaufenbuel

HRAA INITIATIVES

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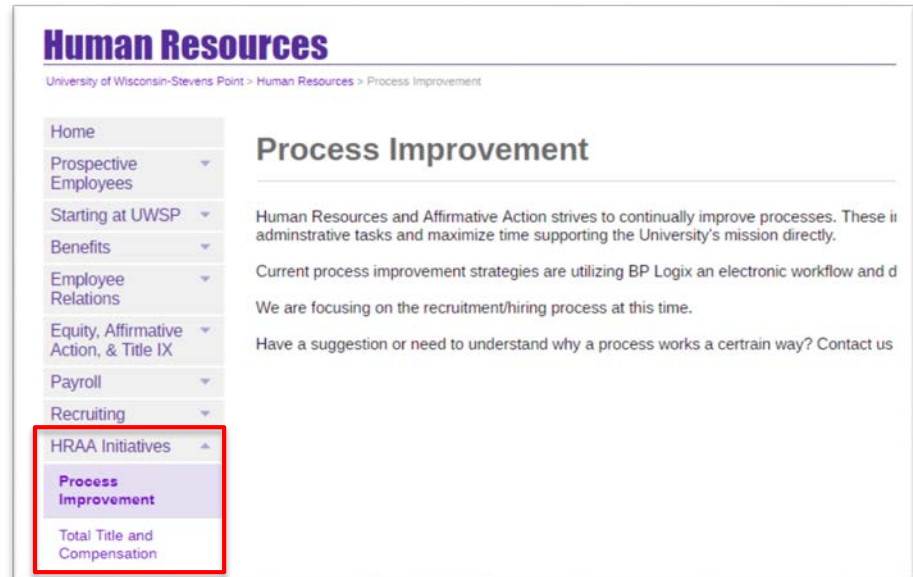
HRAA Initiatives

Updates & Resources

- BP Logix

- Title and Total Compensation

- You can learn about projects in detail through our website
  - HRAA Initiatives > Process Improvement or Total Title and Compensations

Questions?

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Sally Reese, Parking Services Manager

PARKING

Walter Clark, Director of Risk Management

WORKER'S COMP, FIRST AID AND SAFETY

Risk Management

"Empowering departmental personnel to help with safety and risk"
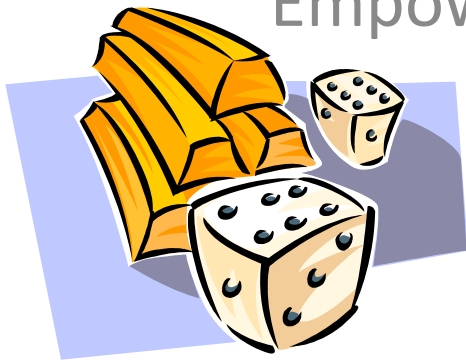
ADA Expectations

– Hired to do all tasks with minimal assistance

– Manage every crisis that comes your way

– Serve all customers to <u>their</u> expectations

– Naturally you will be a great (without help)

– Your department will think you rock

– You will make your boss look like a genius under all circumstances

– (Tongue in Cheek)

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What is Risk Management?

- Manage risks of people & property
- Protect the financial assets
- Minimize the risks of unpredictable events
  - Identify perils
  - Decide how to handle:
    - Avoid
    - Control
    - Insure

What is Risk Management?

- Safety – Loss Control
- Workers Compensation
- Liability Insurance Coverage
- Property Insurance
  - Auto
  - Buildings and Content
  - Moveable Assets
  - Leased Equipment
- Contract Language
  - Indemnification

Safety Training Requirements

When is safety training required?

- At the time of employment
- Prior to exposure to the hazard
- When the environment changes
- Periodic refreshers

Every employee requires some basic safety…….
no matter what their job is.

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Emergency Action Plans

- What is an Emergency Action Plan?
  - A comprehensive guide to direct staff to safety in the event of an emergency.
  - Tailored to each Location

  - What do I do in the first 30 seconds of any emergency?
  - 9-911 or 911... or is there another Campus #

Emergency Action Plans

- Common Emergencies
  - Medical
  - Weather
  - Fire
  - Bomb Threat
- Emergency Phone Numbers
- Exit/Egress Ways
- Relocation/Evacuation Locations

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Vehicle Operations

- Safe Driving Habits

- Vehicle Use Agreement

- Road side Assistance

- Report all Incidents

Employee Injury Reporting Procedures

Injury and Illness Reporting
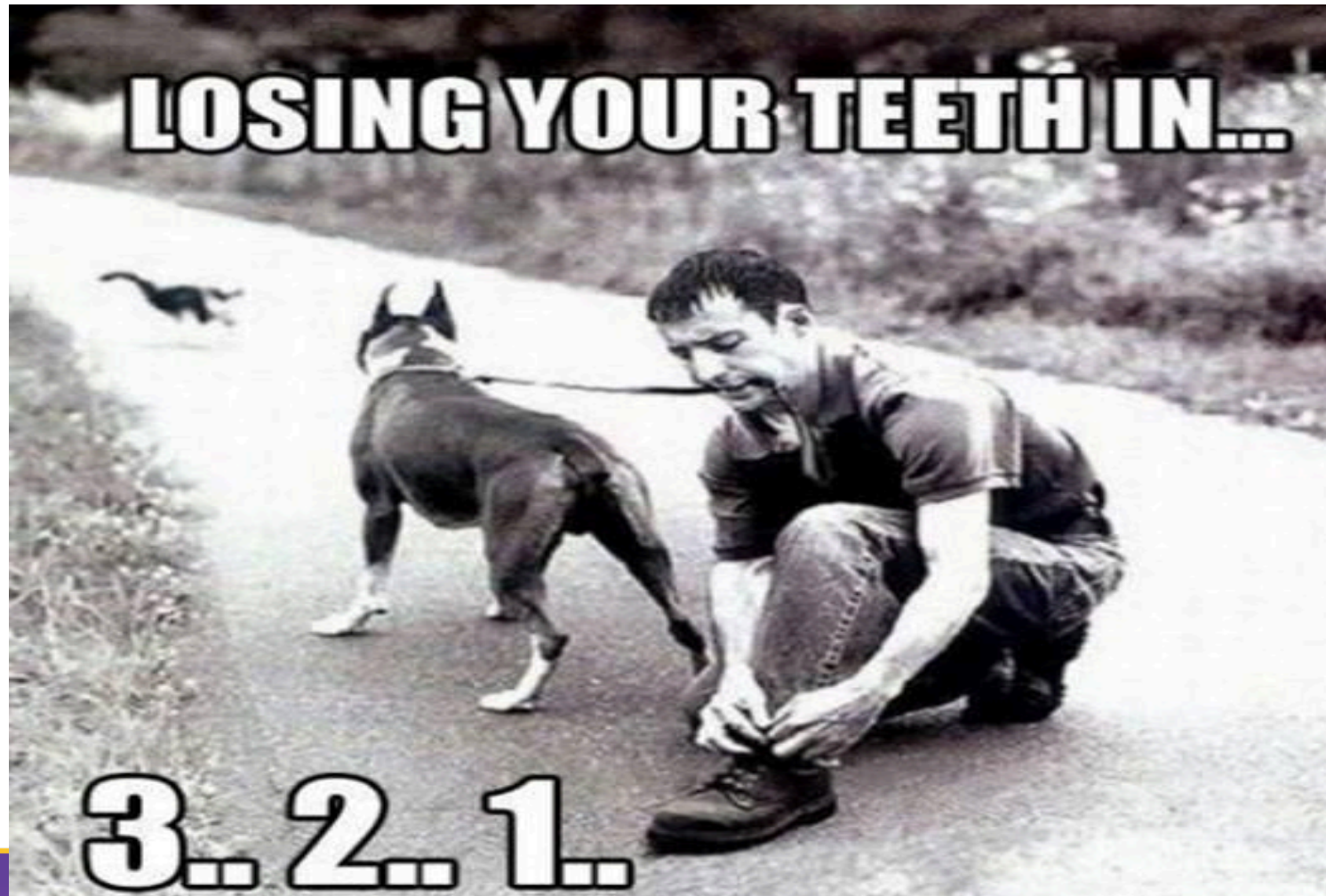
Injury Illness Reporting

- Employee's Work Injury and Illness Report – UWS/OSLP-1

- Employer's first report of injury or disease – WKC-12 –E

- Supervisor's Accident Analysis UWS/OSLP-2

Injury Illness Reporting

- Near Miss Report & General Reporting (no employee injuries or property damage)

For the most current forms
www.uwsa.edu/wc/

Workers Compensation

- The employee must be in the scope of employment

- Contact your respective Workers Comp Coordinator… at each Campus, within 24 hours of injury

- Compensability is determined by the Workers Comp Senior Examiners in System Administration

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Workers Compensation

- Advantages to bringing the employee back to work with restrictions…..Early Return to Work

- Questions? Contact your campus Workers Comp Coordinator

Liability Protection

Insurance Coverage

- Liability
  - Self-funded by State Statute
    - 895.46 (1) Authority to pay judgments against employees
    - 893.82 Rules for filing claims – 120 days
  - Employees, officers, agents
  - Course and scope of employment
    - There must be negligence for coverage to apply!

Insurance Coverage

- Property
  - Self-funded through the State
  - Buildings, content
  - Moveable property, such as:
    - Boats & motors, Art exhibits
    - Transit & Borrowed equipment
    - Athletic & Farm equipment

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Property & Liability

- For all <u>UW System </u>vehicles, make sure the "certificate of insurance" is in the glove compartment.

- It will be necessary to produce it for proof on insurance if pulled over or involved in a crash.

- If employees are traveling out of the country and plan to drive a vehicle, they will need Certificate of Insurance

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Use of a State Vehicle

- Personal items are not insured by the state... bicycles, GPS etc...

- Please contact your Risk Management Representative for specific scenarios

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Leasing and Renting

With respect to rules for using a state leased or state rented vehicles….

All the same prohibitions apply as outlined in the States Fleet Policy and Procedure Manual

Transporting Passengers

Other University employees are always OK

Any other state employee are always OK

Any volunteer with a "volunteer agreement" on file are always OK

<u>"Non-state employee" passenger require special written permission from risk management</u> ….

Use of a "Private Vehicle" on   State Business

- State will reimburse for State business miles only

- Property damage to a personal vehicle is <u>not</u> covered by the State.

- Related liability is assumed by the driver... not the State...personal insurance is primary....The State will not cover any related deductibles

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Questions?

Lunch

Please return by 12:30 PM to start the afternoon session

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Brad Northcraft, Payment Services Manager

PAYMENT SERVICES AND TRAVEL

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Payment Services & Travel

ADA/Administrative Workshop

August 24, 2017

University of Wisconsin
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AGENDA

- ➤ Major Accountabilities
- ➤ Responsibility Assignments
- ➤ Expense Report Workflow
- ➤ Key Performance Indicators
- ➤ Common Reasons for Send Backs
- ➤ Hot Topics
- ➤ Payment of Invoices Workflow

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PAYMENT SERVICES ACCOUNTABILITY OVERVIEW

The mission of Payment Services is to pre-audit and process all non-payroll payment requests using established authentication procedures, in support of the University's instruction, research and public service aspirations.

T & E Reimbursement	Voucher Processing	Other
40%	**40%**	**20%**
Audit and process all employee travel, meals & incidental expenses	Review and process all payments to vendors for goods and services	Miscellaneous Accountabilities
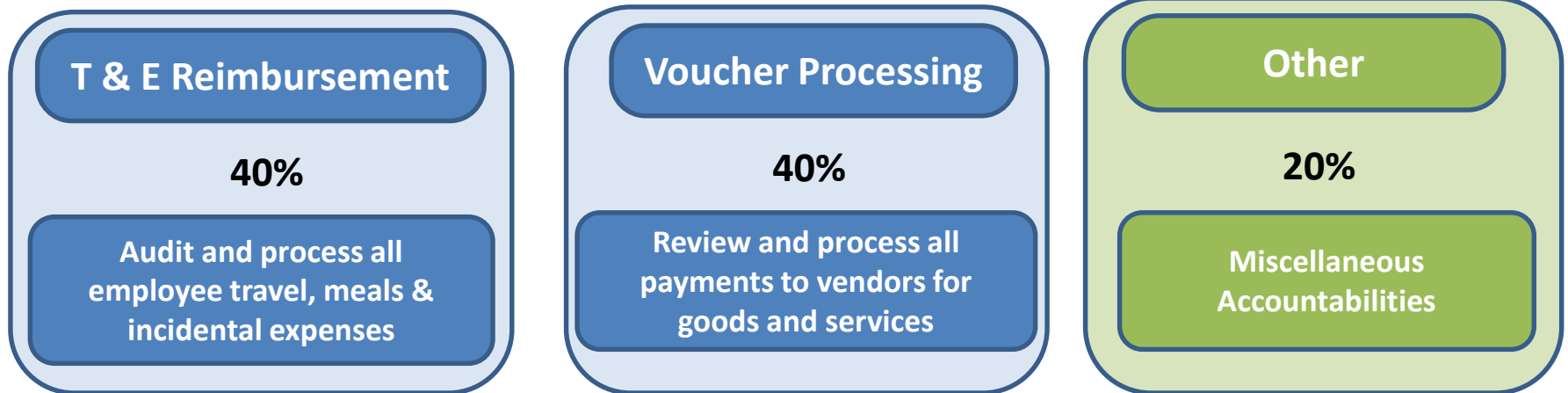
PAYMENT SERVICES RESPONSIBILITY ASSIGNMENTS

Controller

Christina Rickert

Payment Services Manager

Brad Northcraft

Student Employee

Anne Verhagen

Student Employee

Josh Tews

Financial Specialist

Lynette Kvatek

- 40 – Academic Affairs
- 70 – College of Professional Studies

Financial Specialist

Vicki Kleisner

- 60 – Colleges of Letters & Sciences
- 80 – College of Fine Arts
- 15 – Business Affairs

Financial Specialist

Alyssa Barthel

- 90 – College of Natural Resources

Financial Specialist – Project

Adam Swanson

- 10 – Student Affairs

Audit Expense Reporting

Cindy Marczak

- 01 – Chancellor
- 02 – University wide
- 05 - University Advance
- 155xxx – Facilities Invoices
- 30 – University College
- 50 – Information Tech

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Voucher Processing

➤ **In FY17, Payment Services processed over 18,000 vouchers for payment**

➤ **Invoices that enter our workflow**

- ▪ **Purchase Orders**   - *Negative Approval*

- ▪ **Direct Payment**   - *Positive Payment*

EXPENSE REIMBURSEMENT WORKFLOW
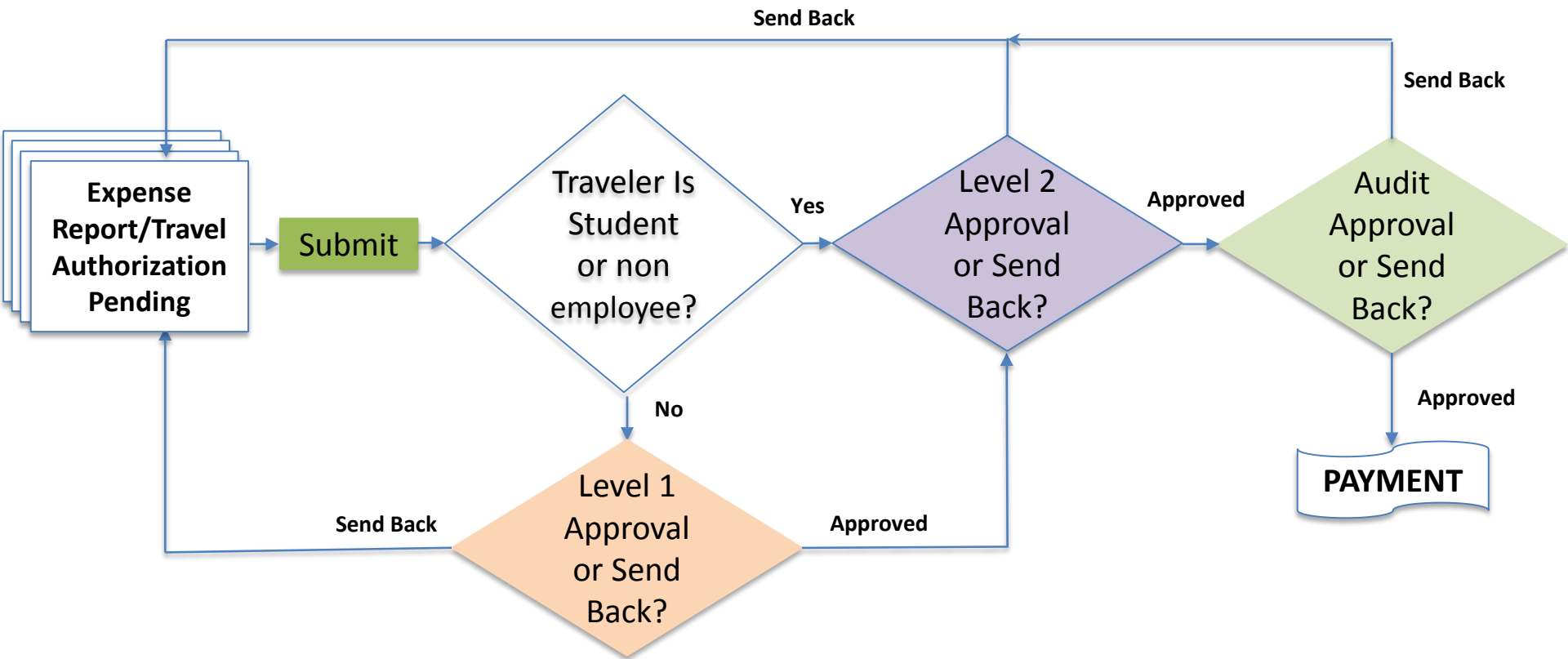
Level 1 = HR Supervisor – direct supervisor of traveler   **Audit Approval** = Payment Services

Level 2 = Department (UDDS) Supervisor – WISDM Manager of the funding account

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WHY SEND BACKS MATTER

➢ **In July, 44% of all expenses reports were sent back at least one time**

Number of Times Sent Back	Longer to Approve
Once	1.4 x
Twice	1.75 x
Three	2.3 x

Top 5 REASONS FOR SEND BACKS

1. Pre-Paid Expenses: Attach your Pro-Card Statement
2. Meals & Incidentals (M&IE): Per Diem Deductions, select first/last day deductions along with provided meals
3. Receipts: Need copies of <u>paid</u> receipts
4. Business Connection under Accountable Plan: Need documentation that supports business purpose
5. Billing Type: Select billing type for destination of trip, whole report

EXPENSE REPORTS PENDING APPROVAL

Expenses Reports Outstanding by Approver Group
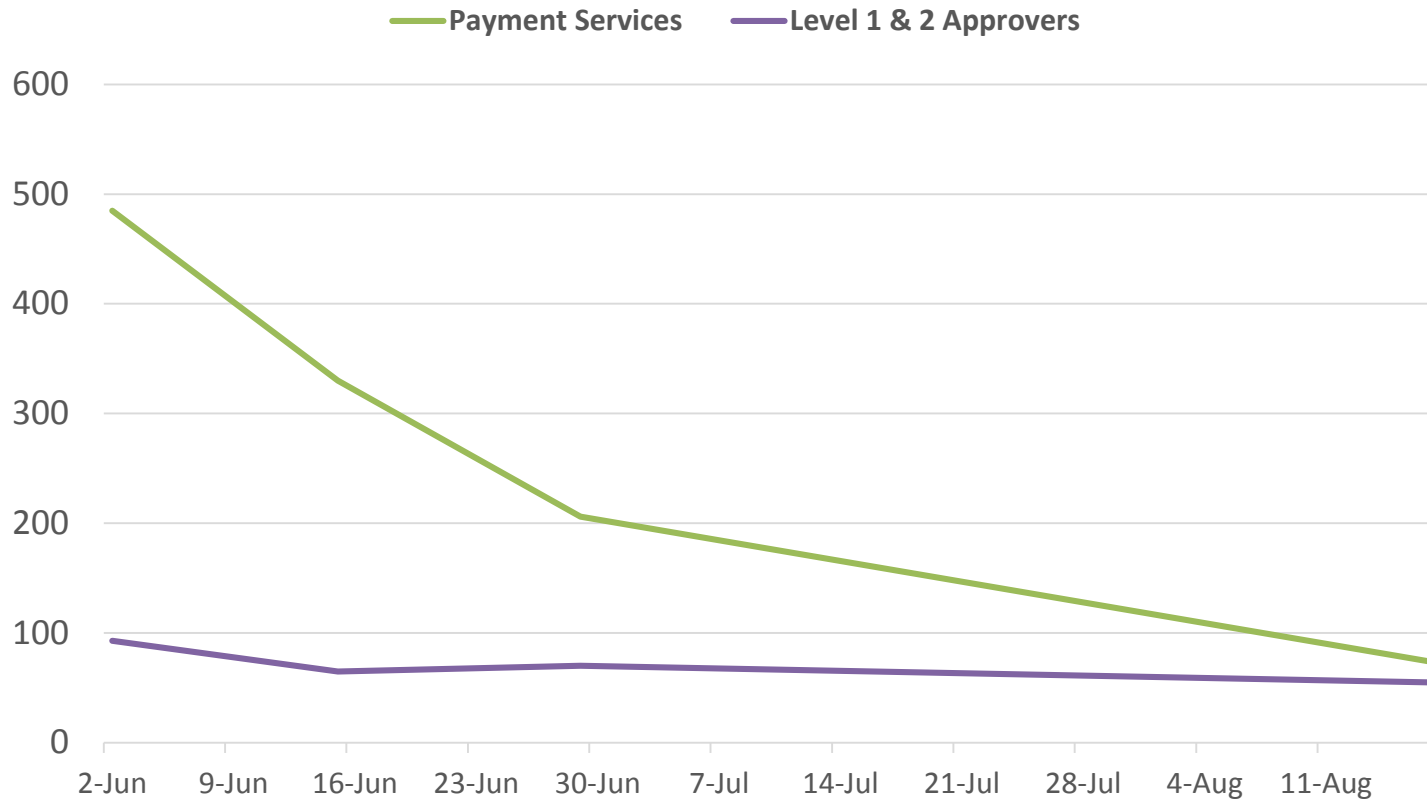
HOT TOPICS ON TRAVEL

➢ **Arriving Early, Extending Your Stay, or Combining Business and Personal Travel**

- ▪ **Base Case versus Actual Travel**

➢ **Arranging & Paying for Travel for Students & Non Employees**

- ▪ **Planning – Concur** *Coordinator & Arranger*
- ▪ **eReimbursement -** Alternate

➢ **Upcoming Travel Training:**

- ▪ **Encourage new colleagues to attend**

	Sep	**Oct**	**Nov**
Beginners	Tue 19th 1- 3 pm Thur 21st 1- 3 pm	Thur 19th 1 – 3 pm	Thurs 16th 1 – 3 pm
Advanced	Tue 26th 9-11 am Thur 28th 1– 3 pm	**DUC Room 374**	

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Heidi Wallner, Purchasing Manager

PURCHASING AND CONTRACTS

Purchasing
(Procurement)

Procurement is the acquisition of Goods, Services or Works from outside external source.

To procure in a way that best fits the needs of the purchaser in terms of cost, quality, quantity, time and location, while being defined by processes intended to promote fair and open competition while minimizing exposure to fraud or collusion.

What the Purchasing Dept. covers:

- Purchasing Card Program (not travel or corporate cards)
- Shop@UW accounts
- Capital Inventory
- Gifts-In-Kind

- Bidding for any purchase* (or group of purchases) of $5,000+
- Procurement Contracts for UWSP
- General purchasing

* Information Technologies, Facilities Services, Printing & Design & CNR have buyers as well

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Purchasing Card Program

The State has three Card Programs:

Purchasing Cards – used to make low dollar purchases, for official use only. See <u>Purchasing</u> for this card.

Travel Cards (Pro-Travel &Corporate) – for state authorized reimbursable travel expenses. (Webinars, conference registrations, team travel meals should also go on this card).
See <u>Payment Services</u> for this card.

Fleet Fuel Cards – fuel is NOT allowed on the Purchasing card. Each state vehicle should have a Fleet Card.
See <u>Facilities Services</u> for this card.

Most Important – READ THE MANUAL.

New version available (draft)

All Needed Forms and Information are on our Website

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P-Card Packets

- Sending in statements:
  - Complete the [Purchasing Log Sheet](#) – NEED business purpose and description
  - If transferring expenses, get the proper authorizations and INCLUDE with your packet.
  - Sign the statement, have your budget manager/supervisor REVIEW all documentation, and sign
  - Turn in within one month of statement date

- Please put in this order:
  1. Statement
  2. Purchase Log
  3. Receipts & documents (in statement order)

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Upcoming P-Card news . . . .

- [New Manual](#) awaiting release

- With the release will come notification, requiring review, comprehension and sign-off of manual for BOTH P-Card Holders and Supervisors

- Roll out **"Transaction Management"** – be able to adjust your funding BEFORE it hits WISDM

To set up an account for your department, fill out application available on the Purchasing Website

Capital Equipment Inventory

Effective July 1, 1997, capital equipment is defined as any individual item costing $5,000 or more and having a useful life of at least two years.

See all information online regarding Capital Equipment.

- If acquiring an item valued at $5,000 or more, be sure to complete a **Capital Equipment Addition Request Form**, available at website.

- If relocating, trading, or surplusing equipment, complete Transfer/ Trade-In Form.

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Gifts-In-Kind

- <u>BEFORE</u> any gift can be accepted:
  1. <u>"Acceptance of Gift-In-Kind" Form</u> must be completed by donor
  2. Signed by Dean, Dept Chair or Director or receiving Dept
  3. Reviewed and approved by Purchasing Manager
     a. each gift may require review by information technology, programmatic, resource consuming, and/or risk management perspective

State Purchasing Concepts

Some of the differences between State purchasing and personal buying or private industry:

1. Tax Exemption
2. Laws, Rules, Regulations, Statutes, Policies
3. Mandatory Contracts
4. Requisition and Approval process
5. Ethics
6. Competition & Consistency
7. Public Perception & Open Government

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1. *If so, **stop** & use.*

Mandatory Contract

STOP

2. *If no #1, then…*

Optional Contract

Purchasing Threshold

When in doubt, call Purchasing.
We are here to help!

<$5,000	$5,000 to $50,000	>$50,000
Best Judgment	Simplified Bid	Request for Bid or Proposal
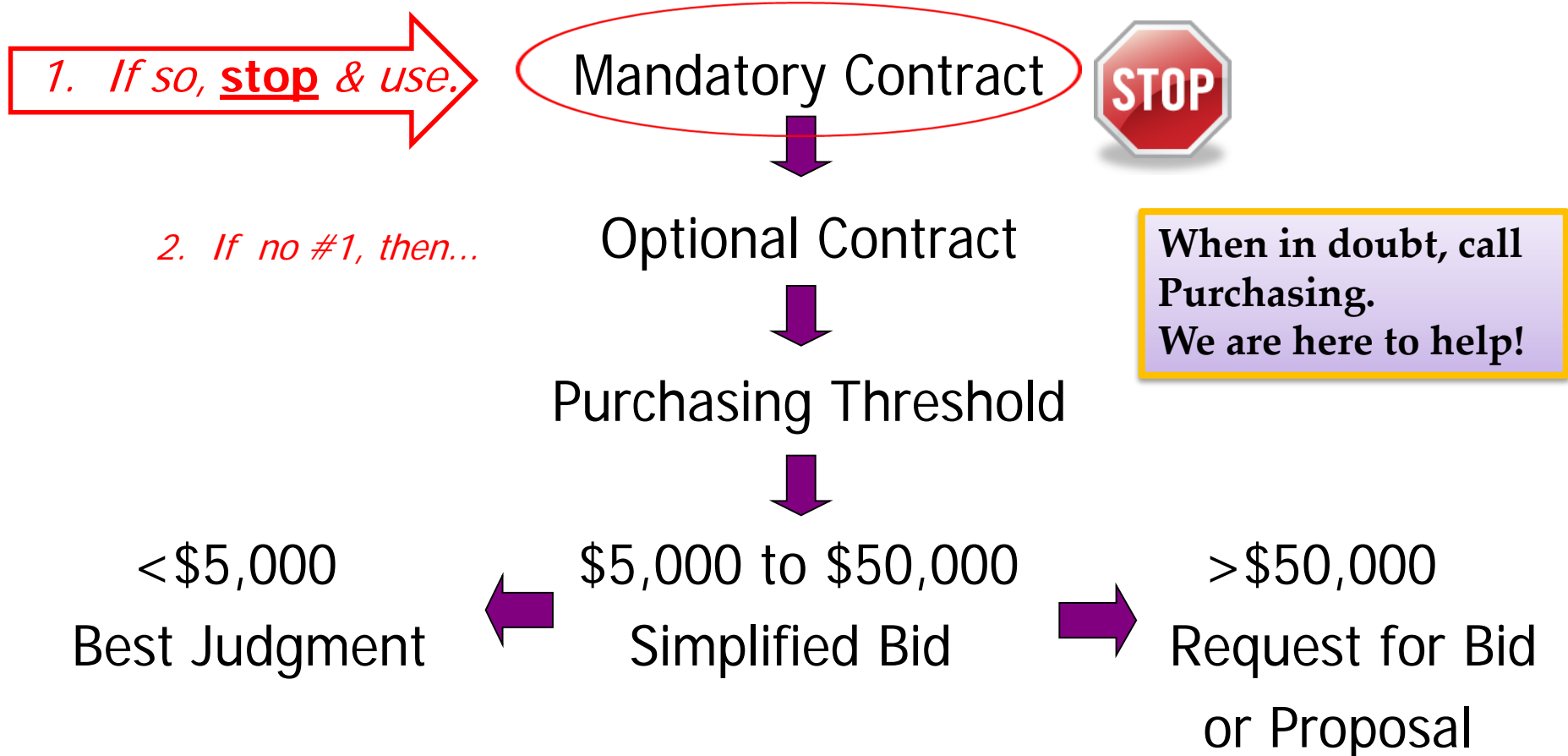
These are the basics, be sure to review all the factors!
(some key factors on the next page)

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Purchasing Decision . . . . Other Factors

*Printing is special & unique... ALL printing must be bid (Regardless of price), and must be done through UWSP Printing & Design, Rob Spindler x2037!

**IT, Audio & Visual items ... ALL IT, Audio & Visual must be vetted and approved by Information Technology Purchasing, Tracy Raatz x3773!

***Sole Source over $5,000: Requires Purchasing Manager Waiver

over $25,000: Requires DOA or Governor's Office approvals...you must reach out to Purchasing to process paperwork! Not a quick process

****Serial Purchasing is prohibited. "Serial contracting" is the practice of a department issuing a series of purchase orders, or using the purchasing card for purchases, to the same vendor for the same commodity or service without the benefit of a competitive process or a waiver as required under state purchasing policies and procedures.

*****Is the Vendor Eligible ... full detail on how to review Vendor Eligibility later in this presentation.

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Using a Contract

Mandatory Contracts:

- Created by **DOA**, exist for commonly used products and high risk goods and services across agencies and campuses

- **Work Center** Contracts

- **Badger State Industries** contracts

  - Furniture

  - Signage

  - Can Liners

Optional Contracts:

- **Statewide/Enterprise Contracts**

- **Piggybacking** is the use of a contract from another Wisconsin state agency.

- **Collective Purchasing** is the use of contract from another state, federal government, or consortium and requires approval.

- **Inter-governmental Purchasing** is purchasing directly from the federal, state, or municipal governments.

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Contracts sites that can be used:

UW-Madison Search Engine
UW-Madison has compiled their contracts, as well as DOA and UW System contracts in this site. They are for commodities that they most commonly purchase. Most of the contracted vendors working with UW-Madison extend the same pricing to other UW campuses with only the addition of freight charges.

UW-System Contracts
These contracts have been bid by UW-System and may be utilized by all the UW System schools for the purchase of goods and services.

VendorNet
This site lists contracts that have been bid following Department of Administration guidelines, and may be available to other state agencies.

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No Contract . . . . Now What??

Best Judgment - under $5,000

(Fiscal Year expense below $5,000)

- If there is no mandatory or agency contract, then you can:
  - Consider deliver, quality, price, conformity of specifications, etc.
  - Be sure Vendor is not Ineligible*

- Best judgment purchases of goods are often paid for by P-Card or Purchase Order.

- **Best judgment does not apply to Printing, IT, Use of Logo, or Legal Services, etc.**

*Please remember about public perception. Don't use family members, friends, etc.

Bidding - anything $5,000 or more

Reach out to a Purchasing Agent on Campus.

- Jim Adamski (Fac Serv) – x2291
- Tracy Raatz – (IT, Audio, Visual) –x3773
- Tammy Naczek – (CNR, Biology) –x4685
- Heidi Wallner – Other, Purchasing Manager x2926

- General Purchasing Office – x2721

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Campus Signed Contracts, Part I

ASSA - Academic Services Support Agreement

- Services provided on a temporary basis to fulfill a unique, noncompetitive activity supporting instruction, research, or public service will be considered an Academic Support Service.

PSA - Personal Services Agreement

- Non-Employee contracts for personal services that are required and are not issued on a Purchase Order. Subject to all purchasing guidelines.

- Examples:
  - Someone coming to speak to a class – ASSA
  - Speaker at an event, not class related – PSA
  - Contractor coming to repair equipment – Purchase Order

- Must be received BEFORE work is performed.

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Campus Signed Contracts, Part II

> Definition of **Contract**: Any agreement between two or more parties that creates a legally binding obligation to do or not do a particular thing.

Vendor Supplied Contract –

- Contracts must be signed by UWSP Authorized Signers.

- To get a contract signed, complete the Contract Routing Form, and submit it with the contract to Purchasing.

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Ineligible Vendor Lists:

Before purchasing a good or service, ensure the vendor is eligible to do business with the state by checking:

Wisconsin Office of Contract Compliance Ineligible Vendor Directory :
Vendors with (un)approved affirmative action plans.

Certification for Collection of Sales and Use Tax Ineligible Vendor Directory:
Vendors who are delinquent on tax payments.

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What additional comments and questions do you have?

Thank you for your Participation!

Dave Barbier, Sustainability Coordinator

SUSTAINABLE PURCHASING

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Sustainable Purchasing – can we make a difference

Campus spent $53,174 on 30% recycled content paper in FY2017
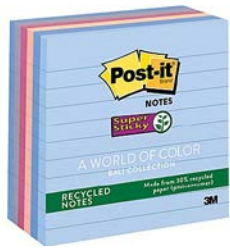
Post-it® Recycled Sticky Notes

100% Recycled File Folders

Contains bio-based cleaning agents that let you clean up in an environmentally safe way

Elmer's School Glue Naturals
•Packaging 25% post-consumer recycled plastic; label 20% recycled paper, printed with soy inks, and uses a natural rubber adhesive
•88% natural glue formula is made from plants, a rapidly renewable resource

B2P Ball point pens made from recycled bottles

Zebrite Highlighters made from 74% post-consumer waste
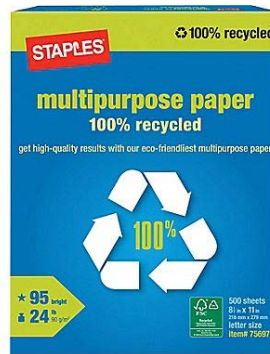
100% Recycled Paper

100% Recycled Paper Clips

University of Wisconsin-Stevens Point
Surplus Property Office

University of Wisconsin
Stevens Point

Green Office Certification

Workplace action areas:

- Energy use
- Purchasing
- Printing
- Dining
- Waste diversion/recycling
- Green meetings and events
- Transportation

Steps:

Contact the Office of Sustainability about your intention to commit.

1. Create an Office Green Team and designate a Green Team Leader
2. Use our resource guide and tips to implement change
3. Follow a checklist to earn points
4. Have your work reviewed
5. Earn a 2-year certificate

Office of Sustainability

Dave Barbier

Sustainability Coordinator

Room 219 Nelson Hall

715-346-2416

dbarbier@uwsp.edu

http://www.uwsp.edu/sustainability

https://www.facebook.com/sustainability.uwsp

https://twitter.com/SustainableUWSP

Break Time!

Robyn Bolton, Assistant Controller

FUNDING TYPES AND WISDM/WISER

Funding and WISDM/WISER

ADA/Administrative Workshop

August 24, 2017

University of Wisconsin
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Funding

- Appropriation

- Fund

- Program Code

- Department ID

- Project ID

- Account Code

- Class Field

Appropriation Structure

- Block Grant
- Budget Categories
  - General Purpose Revenue (GPR)
  - Program Revenue (PR)
  - Segregated Funds (SEG)
  - Program Revenue – State (PR-S)
  - Program Revenue – Federal (PR-F)
  - Revolving (REV)
- Fund Types
  - Annual
  - Biennial
  - Continuing
  - Sum Sufficient

Fund

- General Purpose Revenue (GPR)
  - Funds 100, 102, 104, 109, 110, 402, 403 and 406
- Program Revenue (PR)
  - Funds 123, 128, 131, 132, 133, 136, 189, 228, 231, 233 and 236
- Segregated Funds (SEG)
  - Funds 161, 162, 169 and 170
- Program Revenue – State (PR-S)
  - Funds 156, 157 and 184
- Program Revenue – Federal (PR-F)
  - Funds 143, 144, 145, 146, 147, 148, 149 and 150
- Revolving (REV)
  - Funds 963, 980, 990, 991, 993, 998, 999

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Program Code

- Program 0 – Student Services
- Program 1 – Institutional Support
- Program 2 – Instruction
- Program 4 – Research
- Program 5 – Public Service
- Program 6 – Academic Support
- Program 7 – Physical Plant
- Program 8 – Auxiliary Enterprises
- Program 9 – Financial Aid

Department ID

- Intelligent Numbering
  - Structure

01	Chancellor's Office
02	University Wide
05	University Advancement
10	Student Affairs
15	Business Affairs
30	University College
40	Academic Affairs
50	Information Technology
60	College of Letters & Science
70	College of Professional Studies
80	College of Fine Arts & Communication
90	College of Natural Resources

- List of Active Department IDs
  - General Ledger intranet site
  - myPoint

Project ID

- Number Assigned by Project Lite
- Extramural Gifts & Grants
  - Funds 133, 144 and 233
  - Implemented in FY15
- Intramural Grants
  - Funds 102, 128 and 150
  - Implemented in FY18
  - OSCAR, UPDC, UW System

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Account Code

- Budget
  - Major Class

- Type
  - Asset
  - Expense
  - Liability
  - Revenue

- Assigned by Financial Operations Staff

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Class Field

- Required for Capital Expense Account Codes
  - Building Number

WISDM

- Online Wisconsin DataMart for UW's Shared Financial System (SFS)
- Departments
  - Search
  - Rollup
- Summary Report
  - Report Options
    - Account Tree
    - Drilldown Level
    - Time Period

WISDM Cont.

- Summary Detail
  - Pick Custom Columns
    - Jrnl Line Ref
  - Journal ID
    - Mask Codes
- Projects
- AP/PO

WISDM Cont.

- Payroll
  - Salary/Fringe Search
- Other
  - Journal
  - Transaction
- Budget Control Report
- Favorites

WISER

- Redesigned Version of WISDM
- Modern Interface
- Improved Functionality
- Provides Enhanced, Efficient and More Agile Reporting
- Currently Available:
  - Department Search
  - Expense Data from e-Reimbursement
  - Detailed Transaction Search
  - Payroll Search

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Questions

Contact Information

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Assistant Controller

Old Main Building – Room 001A

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References

- https://www.wisconsin.edu/financial-administration/accounting-and-budget-control/chart-of-accounts/

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Kari Thompson, Fiscal Manager

CASH MANAGEMENT

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Cash Management

Cash Handling Policy and Procedures

Kari Thompson, Fiscal Manager

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Cash Handling Units

In the policy, cash is defined as currency, checks, money orders, e-checks and charge card transactions. If you or someone in your department handles cash, cash handling certifications must be completed, prior to handling cash transactions, and renewed each year.

Controller Intranet

- UWSP Site – www.uwsp.edu
  - Search for Controller
    - Select Controller Office – Intranet
      - Select Policy and Procedures; read through policy.
        - » Complete required Online Training
          - Cash Handling if you are handling cash at any time.
          - Supervisor if you are the supervisor in charge of someone handling cash.
          - Fund Custodian if you are the cash manager/fund custodian for a petty cash or change fund.

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Site Actions ▾   Browse   Page

University of Wisconsin Stevens Point

Campus ▷ Home

Controller Home

Controller's Office

Cash Handling

Policy and Procedures

Online Training Program

Forms

Special Course Fees

Policies and Procedures

BP Logix e-Forms

Instructions to Complete Request

Credit Card Merchants

Recycle Bin

All Site Content

Mission Statement

It is the mission of the UWSP Financial Operations Office to serve the students and staff providing seamless business office services. This accomplished by providing high quality support in accounting, bursar function, general ledger, gift and grant accounting, accounts payable accounts receivable.

Christina Rickert

University of Wisconsin-Stevens Point
2100 Main St.
040B Old Main Building
Stevens Point, WI 54481
Phone: (715)346-3999

DEPOSIT SLIP

Effective 3-16-2017

Provide one copy for deposit and retain one copy for department records.
Deposits can be dropped off at the Bursar's office between 8:30 am - 4:00 pm. After hours, please use the drop box located outside the Bursar's office.

Prepared by: _____
Department: _____
Bldg & Rm # _____ Ext: _____

Source of Funds: _____
Dept Reference #: _____
Date to Bursar: _____

Bursar
Receipt
Number

Revenue

Fund (3 digits)	Department ID (6 digits)	Program Code (1 digit)	Project ID (7 digits)	Acct # (4 digits)	Amount	Taxable Yes/No	Non-Taxable Revenue (9XXX)	Taxable Revenue (94XX)	5% State Sales Tax (9224)	.5% County Sales Tax (9220)	Description (Limit 20 Characters)
							-	-	-	-	
							-	-	-	-	
							-	-	-	-	
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							-	-	-	-	
							-	-	-	-	

$ - TOTALS: $ - $ - $ - $ -

Expenditure Reimbursements - Submit all relevant backup

Fund (3 digits)	Department ID (6 digits)	Program Code (1 digit)	Project ID (7 digits)	Acct # (4 digits)	Amount	Cut and paste from Descr column in WISDM	Cut and paste from Jrnl Line Ref column in WISDM

TOTAL: -

ENTER ENCLOSED AMOUNT HERE:

Checks	
Cash	
Coin	
Total	$ -

TOTALS BALANCE

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Please use and fill out completely when making deposits.

Memorandum of Understanding (MOU)

- Each cash handling unit must submit an MOU for review and approval by the Controller. This documents the cash handling procedures within your department and helps ensure that cash handling policies and segregation of duties are complied with. There is an example provided under the Forms link and there is a blank form in fillable format to complete.

- In the next several months, we will be meeting with cash handling units to review the MOUs on file and to provide feedback on processes and procedures.

Clear Form

UWSP Cash Handling Unit
Memorandum of Understanding

Date:	Contact Name:
Department Name:	Contact Phone Number:
Department ID (UDDS):	Contact Email:
Department Physical Address:	Alternate Contact Name:
Department Head Name/WISDM Manager:	Dept. Head Name/WISDM Mgr. Signature:

Controller Approval:	Date:

Department Reason(s) for collecting funds, and types of funds accepted:

Safekeeping and Depositing of funds:

- DAILY INTERNAL CONTROLS:

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Key Points of Cash Handling

- Online Training Program and Certifications

- Segregation of Duties

- Safekeeping of Funds

- Depositing Funds

*A goal of the Cash Handling program
is to reduce the number of cash handling units
on campus.*

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Questions?

We want your feedback!

Please watch your email for a survey to complete.