

ADA and Administrative Workshop

Hosted by: Division of Business Affairs

August 24, 2017

8:30 AM – 3:30 PM



Vice Chancellor Kristen Hendricksen

WELCOME!



Paul Hasler, Director of Facility Services

Tina Kramer, Business Manager

EVENT PLANNING AND FACILITY SERVICES



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

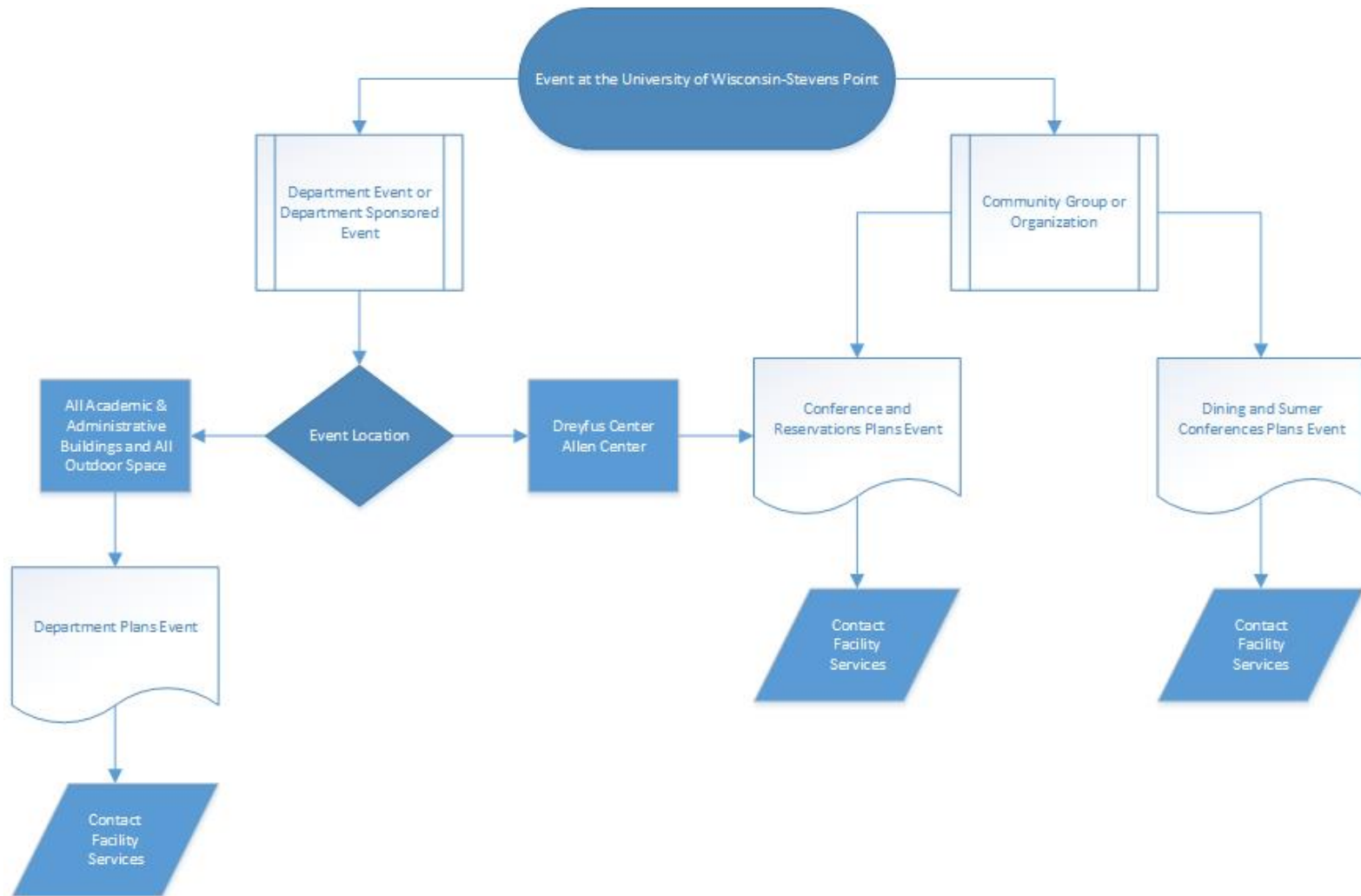


Mission Statement: Advancing the academic mission through craftsmanship, artistry, and exceptional service.



Facility Services

Academic and Administrative Building Events



<http://www.uwsp.edu/facsv/Facility%20Linkable%20Documents/Facility%20Services%20Campus%20Events.pdf>



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





Health Promotion/Wellness at UW-Stevens Point

Want to help others adopt a healthy lifestyle? The health promotion/wellness program at UW-Stevens Point is for you! Learn more about this program accredited by the National Wellness Institute:

More...



New UW-Stevens Point Honors Program draws high-achieving students

Sydney Richetto, first-year English major

More...

Upcoming Events

- Aug 25** Becoming an Outdoors-Woman workshop, Aug. 25-27
- Aug 31** New Student Welcome Week, Aug. 31-Sept. 4
- Aug 31** New Student Move In, Thursday, Aug. 31
- Sept 3** Returning Student Move In, Sunday, Sept. 3
- Sept** First day of classes, Tuesday,

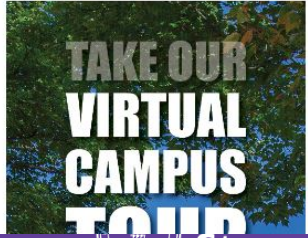
Latest News

- 08/12/2017**
UWSP students help release of two rehabilitated fishers
While taking summer classes at Treehaven, a field station of the university, students learn and practice different fields of science, including wildlife research.
- 08/01/2017**
UW-Stevens Point theatre and dance season announced
Experience Tony Award-winning shows and original choreography by the Department of Theatre and Dance throughout the 2017-18 academic year.
- 07/29/2017**
Chancellor: College education benefits the public good
UW-Stevens Point is making a positive impact by preparing students as future employees, taxpayers, leaders and volunteers.
- 07/22/2017**

Learn More

Visit

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University of Wisconsin-Stevens Point > About UWSP > Site Index

Site Index

- A
- B
- C
- D
- E
- F**
- G
- H
- I
- J
- K
- L
- M
- N
- O
- P
- Q
- R
- S
- T
- U
- V
- W
- X
- Y
- Z
- 0-9

- Facilities Planning
- Facility Services
- Fact Book
- Faculty & Staff Employment
- Faculty & Staff, Computer Services for
- Faculty Council
- Family & Consumer Sciences
- Fees
- Festival of the Arts
- Field Experiences & Student/Intern Teaching
- Film/TV Production Camp
- Financial Aid
- Fine Arts and Communication
- Fine Arts Camps, Summer
- Fire Emergencies

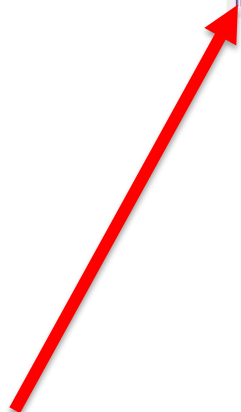




Facilities Planning

University of Wisconsin-Stevens Point > Facilities Planning

- Home
- Contact
- Campus Master Plan
- Campus Maps
- Projects
- Facilities Planning Intranet



Building Plans

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



- 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

Facilities Planning

Contact Info

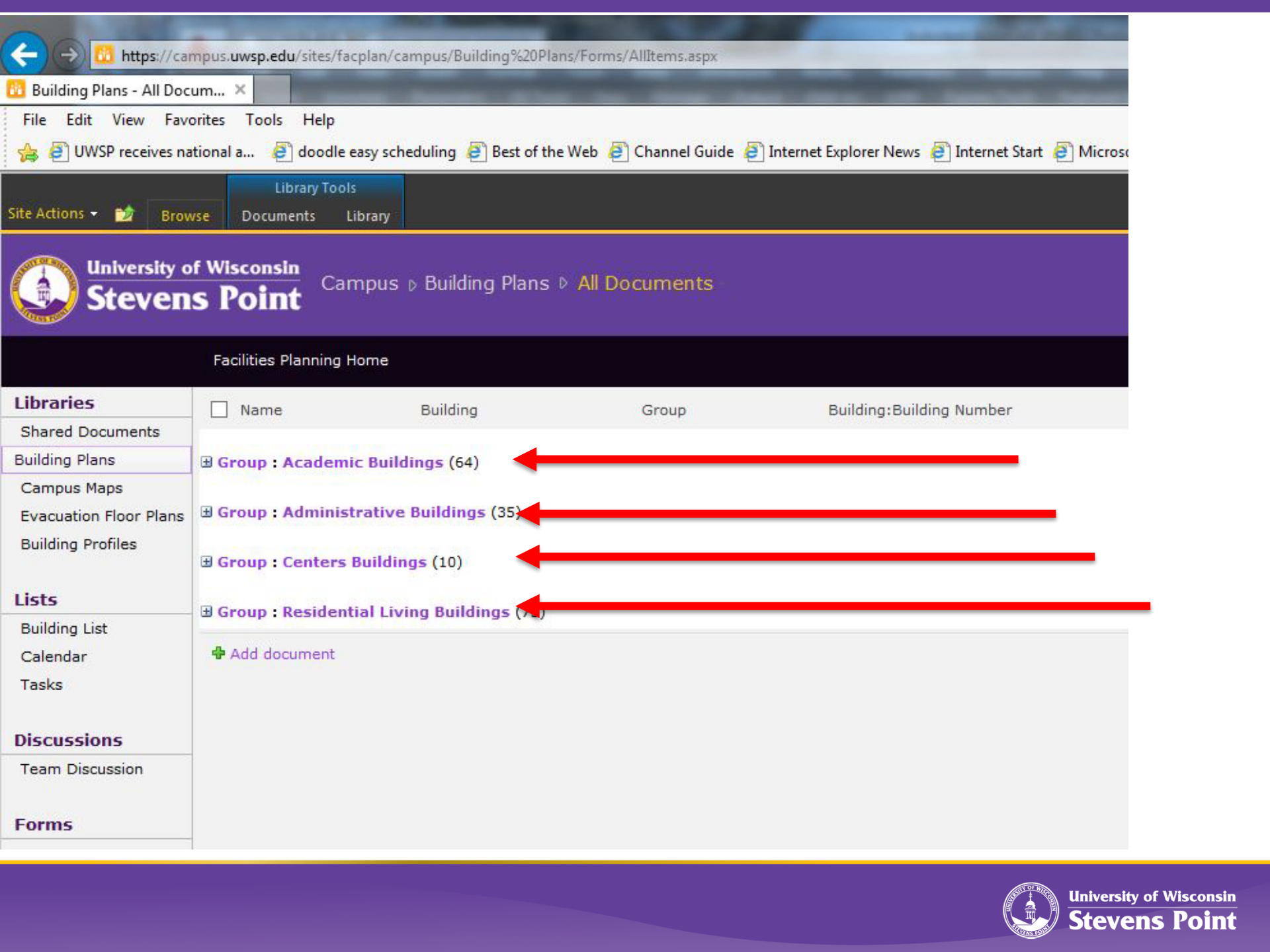
Facilities Planning, 117 M&M, Phone: 715-346-2781, facplan@uwsp.edu

Facilities Planning Website: <http://www.uwsp.edu/busaffairs/facplan/Pages/default.aspx>

Staff

Carl Rasmussen, Director
Room 125B M&M
(715)346-2781
crasmuss@uwsp.edu





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

Building Plans - All Docum... x

File Edit View Favorites Tools Help

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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
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- Team Discussion
- Forms**

<input type="checkbox"/> Name	Building	Group	Building:Building Number
<input checked="" type="checkbox"/>	Group : Academic Buildings (64)		
<input checked="" type="checkbox"/>	Group : Administrative Buildings (35)		
<input checked="" type="checkbox"/>	Group : Centers Buildings (10)		
<input checked="" type="checkbox"/>	Group : Residential Living Buildings (74)		
<input checked="" type="checkbox"/>	+ Add document		

- Libraries
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<input type="checkbox"/>	Name	Building	Group	Building:Building Number
Group : Academic Buildings (64)				
<input type="checkbox"/>	Building : Albertson Hall (9)			
<input type="checkbox"/>	Building : Chemistry Biology Building (8)			
<input type="checkbox"/>	Building : College of Professional Studies (6)			
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<input type="checkbox"/>	Building : Waste Education Center (3)			
<input type="checkbox"/>	Building : Wood Utilization Lab (2)			
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Group : Centers Buildings (10)				
Group : Residential Living Buildings (75)				
+ Add document				



Libraries	<input type="checkbox"/> Name	Building	Group	Building:Building Number	Building:Building Abrev
Shared Documents	Group : Academic Buildings (64)				
Building Plans	Building : Albertson Hall (9)				
Campus Maps	Albertson Hall Lower Level 9.13.16	Albertson Hall	Academic Buildings	8	ALB
Evacuation Floor Plans	Albertson Hall 1st Floor 9.13.16	Albertson Hall	Academic Buildings	8	ALB
Building Profiles	Albertson Hall 2nd Floor 9.13.16	Albertson Hall	Academic Buildings	8	ALB
Lists	Albertson Hall 5th Floor 9.13.16	Albertson Hall	Academic Buildings	8	ALB
Building List	Albertson Hall 7th Floor 9.13.16	Albertson Hall	Academic Buildings	8	ALB
Calendar	Albertson Hall Roof Plan 09.13.16	Albertson Hall	Academic Buildings	8	ALB
Tasks	Albertson Hall 3rd Floor 5.15.17	Albertson Hall	Academic Buildings	8	ALB
Discussions	Albertson Hall 4th Floor 6.21.17	Albertson Hall	Academic Buildings	8	ALB
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Forms	Building : Chemistry Biology Building (8)				
Recycle Bin	Building : College of Professional Studies (6)				
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Open Document

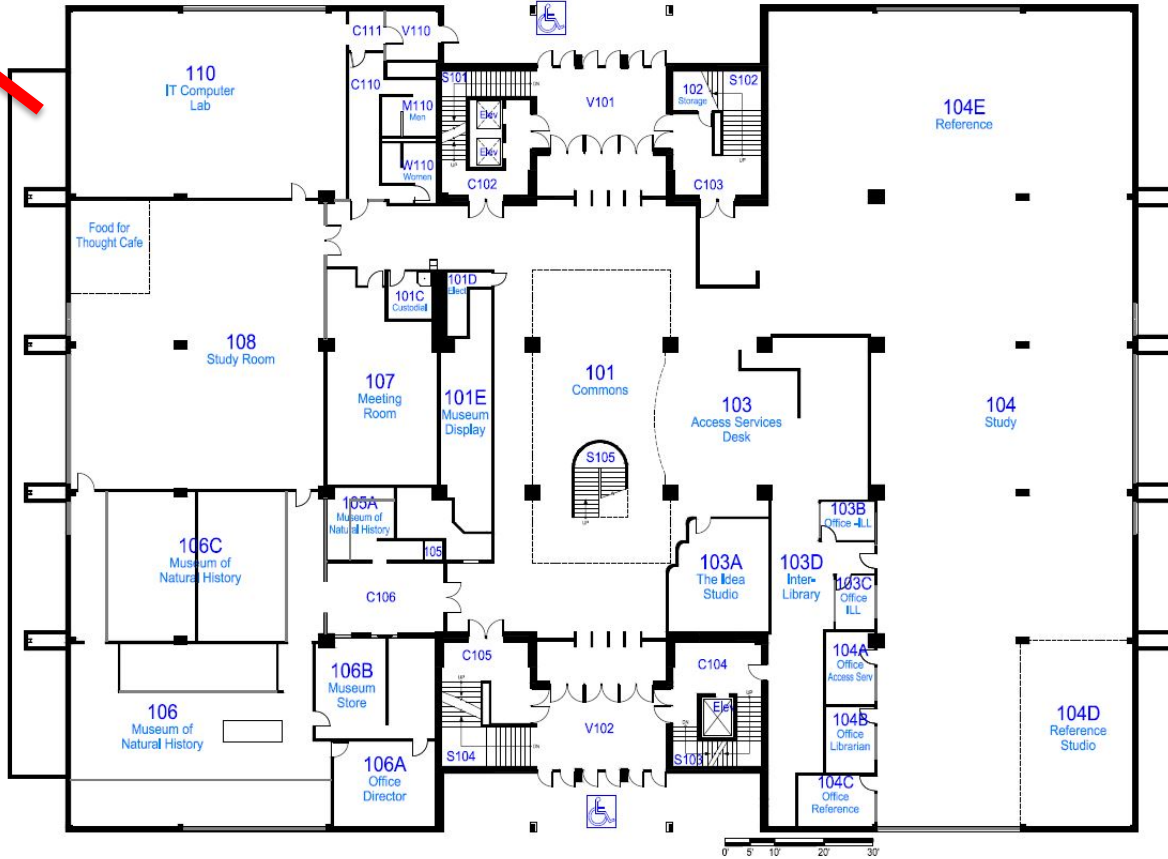
You are about to open:
 Name: ... 1st Floor 9.13.16.pdf
 From: campus.uwsp.edu

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



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

Albertson Hall First Floor

Bldg No: 0008



Libraries	<input type="checkbox"/> Name	Building	Group	Building:Building Number	Building:Building Abrev
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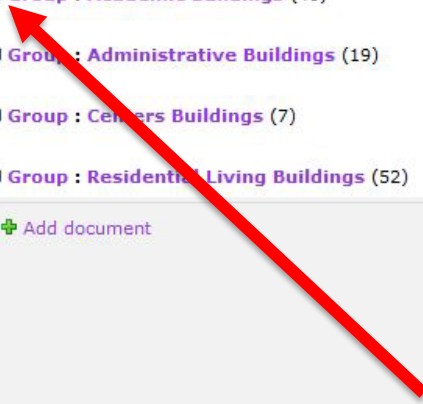
Group : Academic Buildings (40)

Group : Administrative Buildings (19)

Group : Centers Buildings (7)

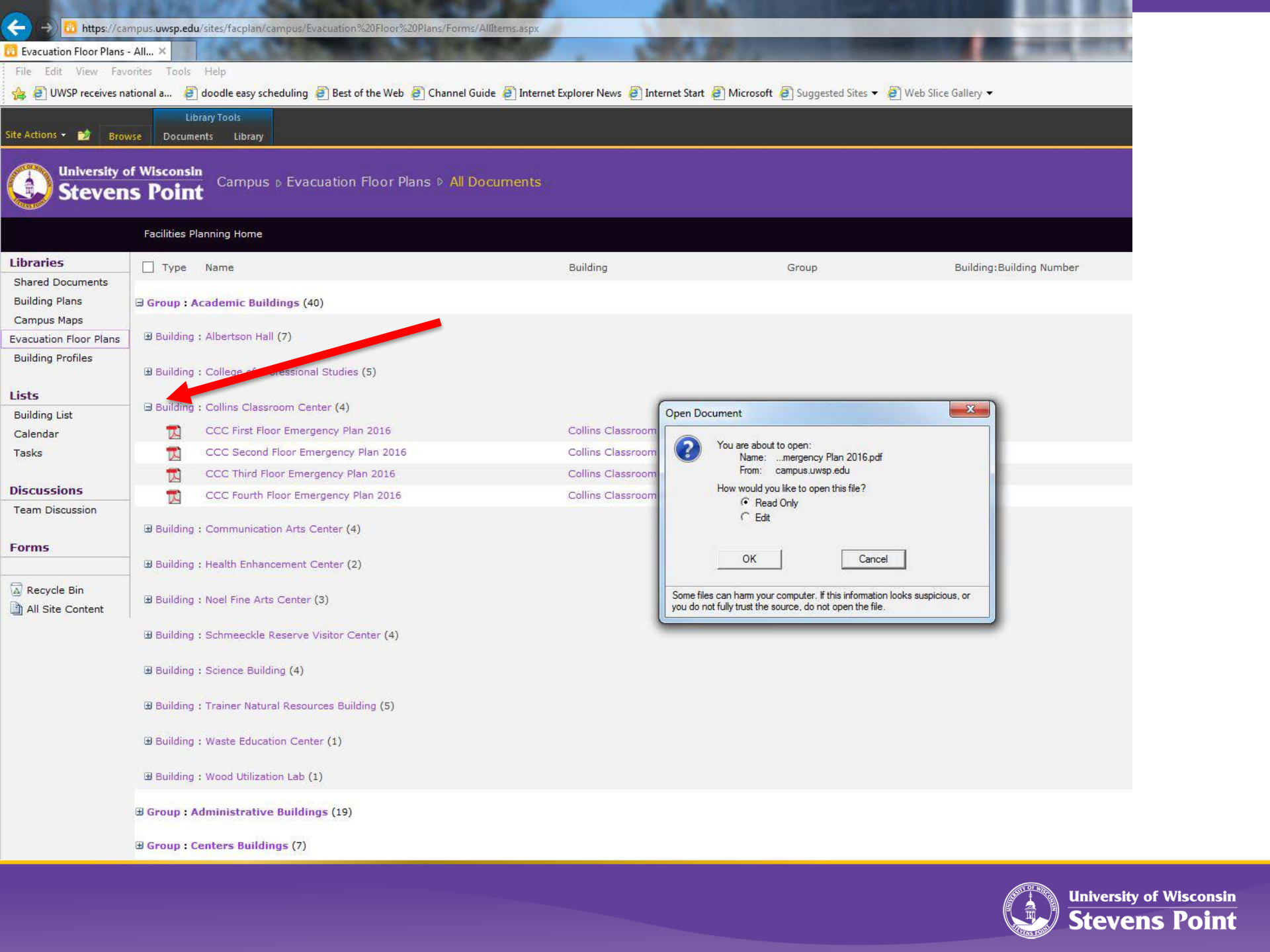
Group : Residential Living Buildings (52)

+ Add document



Facilities Planning Home

Libraries	Type	Name	Building	Group
Shared Documents				
Building Plans				
Campus Maps				
Evacuation Floor Plans				
Building Profiles				
Lists				
Building List				
Calendar				
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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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<input type="checkbox"/>	Document	CCC First Floor Emergency Plan 2016	Collins Classroom		
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Open Document

You are about to open:
 Name: ...emergency Plan 2016.pdf
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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**
 Put 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. Individuals such as **FOIE** or **HANDICAPPED MATERIALS RELEASES** may require that alternate plans be enacted. 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

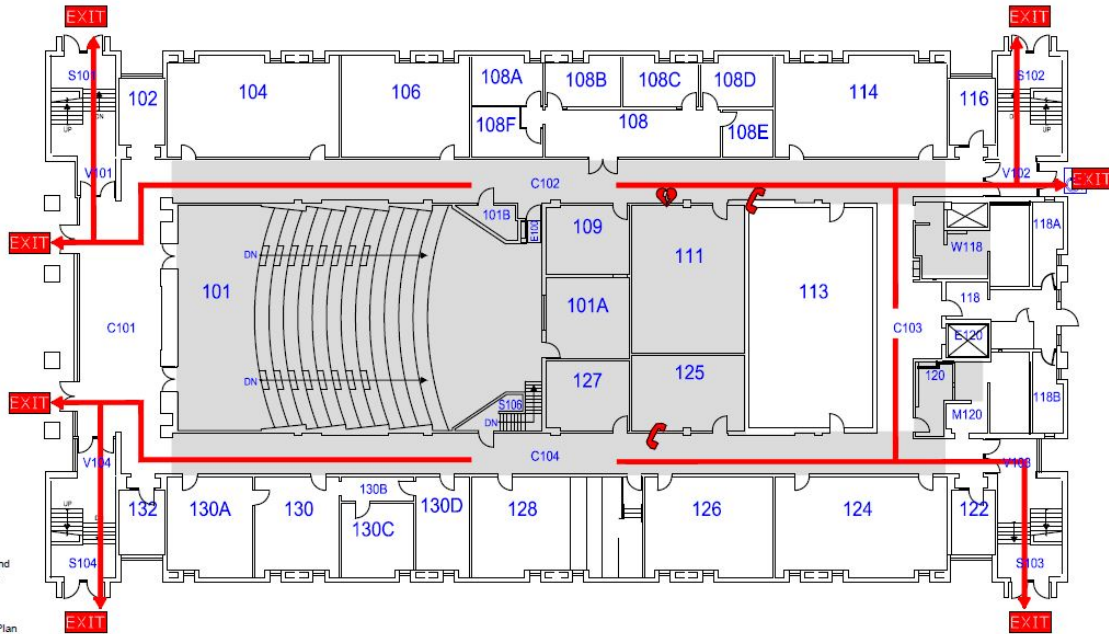
- YOU ARE HERE
- EMERGENCY PHONE
- AED (Located on 1st floor)
- SEVERE WEATHER/ TORNADO SHELTER (Located on 1st and 2nd Floors)
- EVACUATION ROUTES

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/mgmt> for details on all emergencies.

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



	Drawn: Angie Henschel Date: 11/15/16	<h2>Joseph V. Collins Classroom Center</h2> <h3>First Floor Emergency Plan</h3>	Bldg No: 0007
	UWSP Facilities Planning		

Libraries	<input type="checkbox"/> Type	Name	Building	Group
<p>Shared Documents</p> <ul style="list-style-type: none"> Building Plans Campus Maps 				
<p>Evacuation Floor Plans</p> <ul style="list-style-type: none"> Building Profiles 				
<p>Lists</p> <ul style="list-style-type: none"> Building List Calendar Tasks 				
<p>Discussions</p> <ul style="list-style-type: none"> Team Discussion 				
<p>Forms</p>				
<ul style="list-style-type: none"> Recycle Bin All Site Content 				
<p>Group : Academic Buildings (40)</p>				
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<p>Group : Residential Living Buildings (52)</p>				

Libraries	<input type="checkbox"/> Name Building Group Building:Building Number
Shared Documents Building Plans Campus Maps Evacuation Floor Plans Building Profiles	Group : Academic Buildings (64) Group : Administrative Buildings (35) Group : Centers Buildings (10)
Lists Building List Calendar Tasks	Group : Residential Living Buildings (75) + Add document
Discussions Team Discussion	
Forms Recycle Bin All Site Content	

DIMS

Updates and Room Change Requests



DIMS

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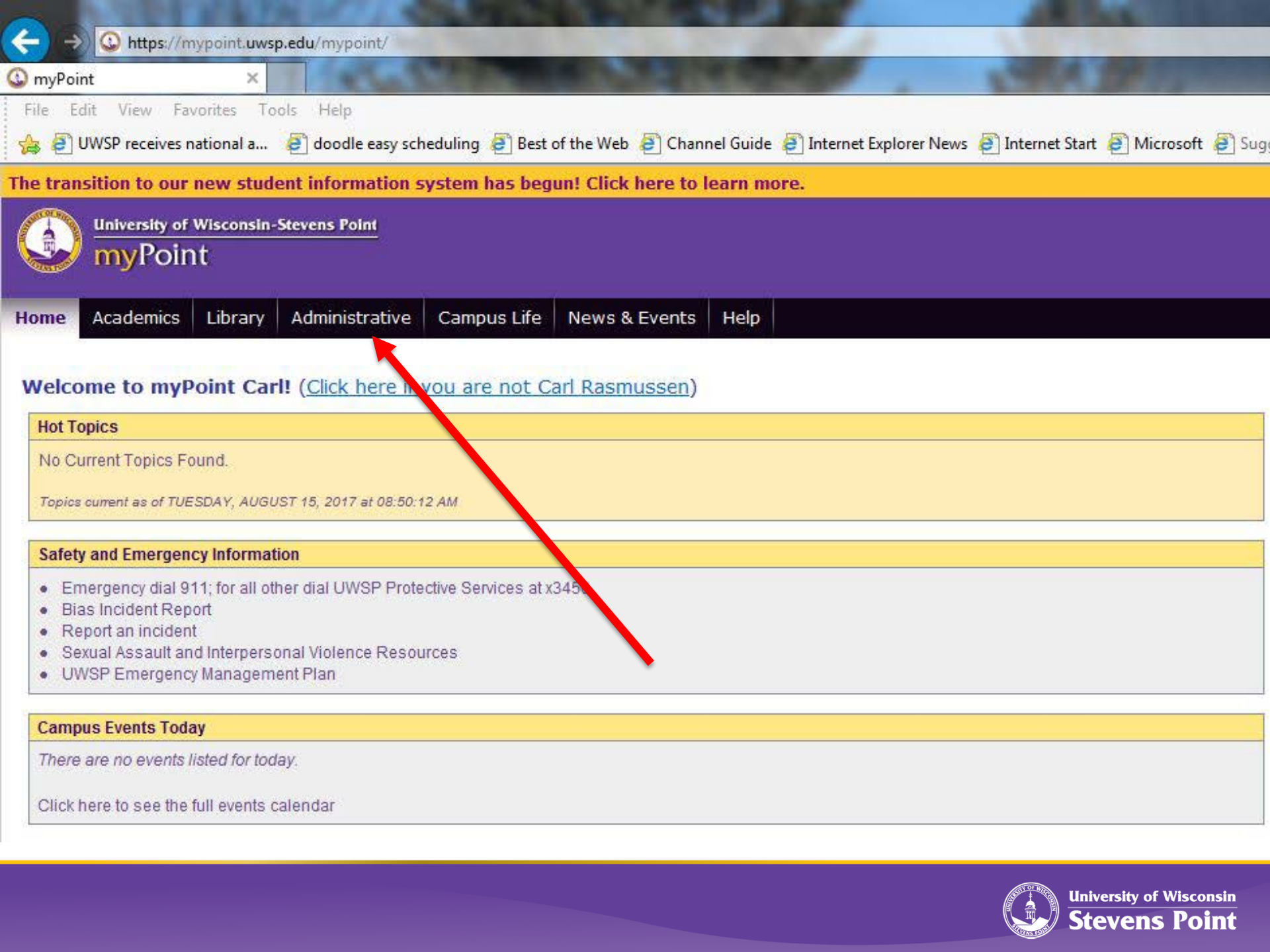


DIMS

???

Department Information Managers System





https://mypoint.uwsp.edu/mypoint/

myPoint

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UWSP receives national a... doodle easy scheduling Best of the Web Channel Guide Internet Explorer News Internet Start Microsoft Sug

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



University of Wisconsin-Stevens Point

myPoint

Home Academics Library Administrative Campus Life News & Events Help

Welcome to myPoint Carl! (Click here if you are not Carl Rasmussen)

Hot Topics

No Current Topics Found.

Topics current as of TUESDAY, AUGUST 15, 2017 at 08:50:12 AM

Safety and Emergency Information

- Emergency dial 911; for all other dial UWSP Protective Services at x345
- Bias Incident Report
- Report an incident
- Sexual Assault and Interpersonal Violence Resources
- UWSP Emergency Management Plan

Campus Events Today

There are no events listed for today.

Click here to see the full events calendar

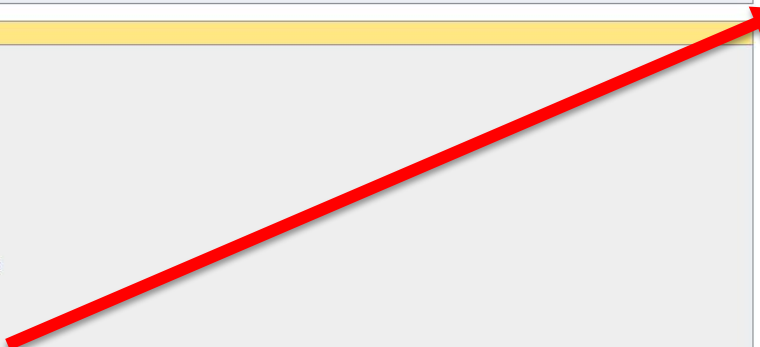
The transition to our new student information system has begun! Click here to learn more.

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 (WSDM)
- 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



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



← → <https://mypoint.uwsp.edu/mypoint/Modules/LinksModule/Redirect.aspx?addr=https%3a%2f%2fcampusinfo.uwsp.edu%2fdims%2f&lid=114&tid=41&mid=71&cid=71>

myPoint Waiting for mypoint.uwsp.e... x

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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

This is an Official Department

Old DIMS

Department Full Name	Facilities Planning	Req. Change or Verif.
Department Abbreviated Name	Facilities Plan	
Department Short Name	FACPLAN	
College the Department is in		
Department Email Address	<input type="text" value="FacilitiesPlanning@uwsp.edu"/>	(example: Infotech@uwsp.edu)
Department Phone	<input type="text" value="715"/> <input type="text" value="346"/> - <input type="text" value="2781"/>	
Department Fax	<input type="text" value="715"/> <input type="text" value="346"/> - <input type="text" value="2447"/>	
<input type="button" value="Update Department Information"/>		

Rooms In Department [Req. Room Desc Change](#)

Del	Building	Room	Room Description	Department Use	Room Type
<input type="checkbox"/>	M & M	0125A	ASSOC PLANNER	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	M & M	0125B	PLNNG DIRECTOR	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	M&M Addn 2	0125	FACILITIES PLAN	<input type="text"/>	Main Office
<input type="checkbox"/>	M & M	0135	PLAN ROOM	<input type="text"/>	<input type="text"/>

Department Personnel

Last Name	First Name	Building	Room	Email ID	Pub-Ext	Delete
Acker	George	M & M	0125A	gacker	715 346-4247	<input type="checkbox"/>
Henschel	Angelica	M&M Addn 2	0125	ahensche	715 346-4101	<input type="checkbox"/>
Rasmussen	Carl	M & M	0125B	crasmuss	715 346-2781	<input type="checkbox"/>

Department Roles

Del	Last Name	First Name	Role Description
<input type="checkbox"/>	Rasmussen	Carl	Department Information Manager
<input type="checkbox"/>	Rasmussen	Carl	Department Manager
<input type="checkbox"/>	Rasmussen	Carl	Director

Appointments:

Departments:



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

New DIMS

DEPARTMENT INFORMATION	Request Change or Verify Department Full Name
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Department Phone	<input type="text" value="(715) 346-2781"/> (example: (XXX) XXX-XXXX)
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<input type="button" value="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
<input type="checkbox"/>	M & M	0125B	PLNNG DIRECTOR	<input type="text"/>	<input type="text" value="v"/>
<input type="checkbox"/>	M & M	0135	PLAN ROOM	<input type="text"/>	<input type="text" value="v"/>
<input type="checkbox"/>	M & M	0125A	ASSOC PLANNER	<input type="text"/>	<input type="text" value="v"/>
<input type="checkbox"/>	M&M Addn 2	0125	FACILITIES PLAN	<input type="text"/>	Main Office <input type="text" value="v"/>

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

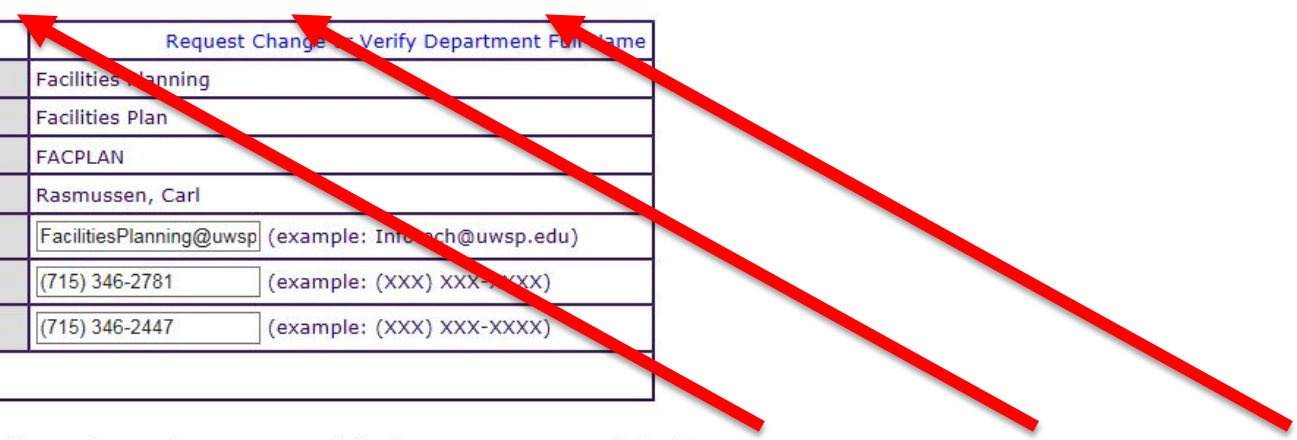
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University of Wisconsin-Stevens Point
Dept. Information Managers System

Facilities Planning

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

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Select	Building	Room	Room Description	Department Use	Room Type
<input type="checkbox"/>	M & M	0125B	PLNNG DIRECTOR	<input type="text"/>	<input type="text" value="v"/>
<input type="checkbox"/>	M & M	0135	PLAN ROOM	<input type="text"/>	<input type="text" value="v"/>
<input type="checkbox"/>	M & M	0125A	ASSOC PLANNER	<input type="text"/>	<input type="text" value="v"/>
<input type="checkbox"/>	M&M Addn 2	0125	FACILITIES PLAN	<input type="text"/>	Main Office <input type="text" value="v"/>

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Department Fax	<input type="text" value="(715) 346-2447"/> (example: (XXX) XXX-XXXX)
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<input type="checkbox"/>	M & M	0125B	PLNNG DIRECTOR	<input type="text"/>	<input type="text" value="v"/>
<input type="checkbox"/>	M & M	0135	PLAN ROOM	<input type="text"/>	<input type="text" value="v"/>
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<input type="checkbox"/>	M&M Addn 2	0125	FACILITIES PLAN	<input type="text"/>	Main Office <input type="text" value="v"/>

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

Facilities Planning

Add / Edit Rooms In Department

Select a building

Building: 

[Back to Department Information](#)

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

Facilities Planning

Add / Edit Rooms In Department

Select a building

Building:

- 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

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Direct comments to [Information Technology Help Desk-AIS](#)

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
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- 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





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
<input type="checkbox"/>	0100 - GROUNDS EQPMNT			GROUNDS EQPMNT	
<input type="checkbox"/>	0100 - ROOF			ROOF	
<input type="checkbox"/>	0100A - SMALL EQUIPMENT			SMALL EQUIPMENT	
<input type="checkbox"/>	0101 - AUTO MECHANIC			AUTO MECHANIC	
<input checked="" type="checkbox"/>	0101A - AUTO SHOP OFFIC			AUTO SHOP OFFIC	
<input type="checkbox"/>	0101B - SECONDARY ELECT			SECONDARY ELECT	
<input type="checkbox"/>	0101C - PRIMARY ELECT			PRIMARY ELECT	
<input type="checkbox"/>	0102 - MECHANICAL ROOM			MECHANICAL ROOM	
<input type="checkbox"/>	0103 - STAIRWAY			STAIRWAY	
<input type="checkbox"/>	0103 - GROUNDS STORAGE			GROUNDS STORAGE	
<input type="checkbox"/>	0104 - STAIRWAY			STAIRWAY	
<input type="checkbox"/>	0104 - GRNDS/CUST SPRV			GRNDS/CUST SPRV	
<input type="checkbox"/>	0104A - GRNDS INTERN			GRNDS INTERN	
<input type="checkbox"/>	0105 - CORRIDOR			CORRIDOR	
<input type="checkbox"/>	0105 - IRRIGATION EQPM			IRRIGATION EQPM	

Update Department Rooms

Back to Department Information



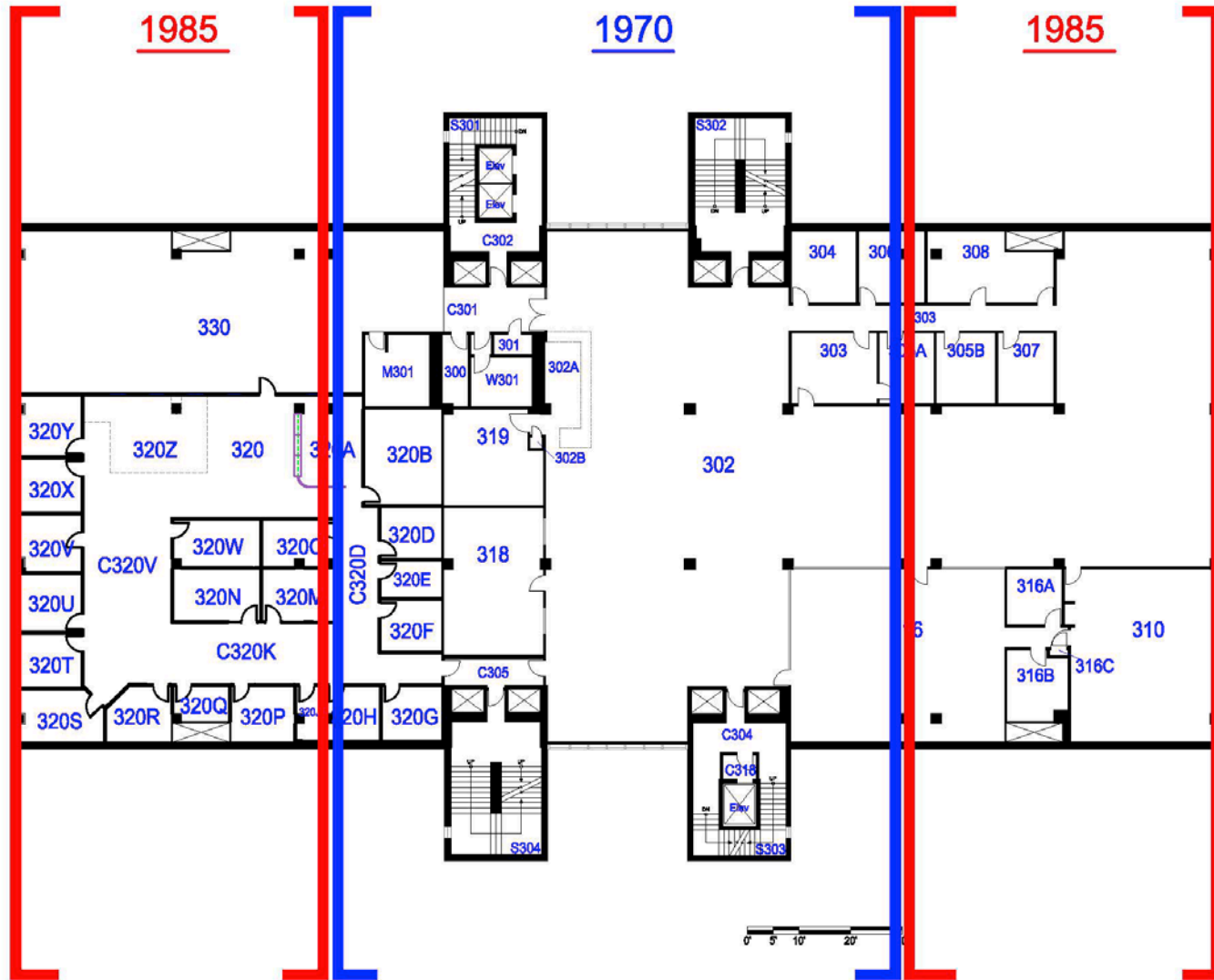
Select a building

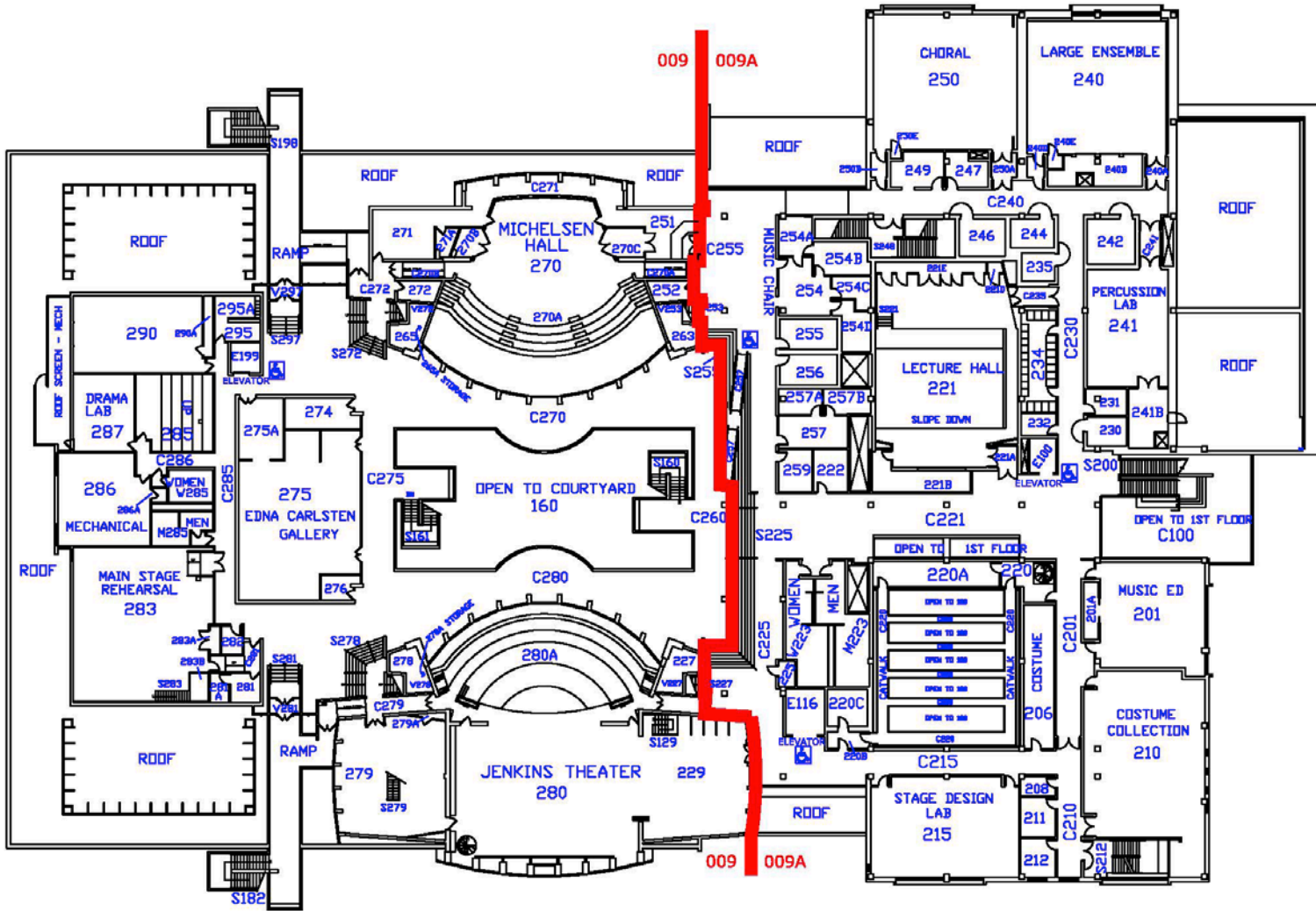
Building:

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

Back to







Drawn: Angie Henschel
Date: 10/27/2016

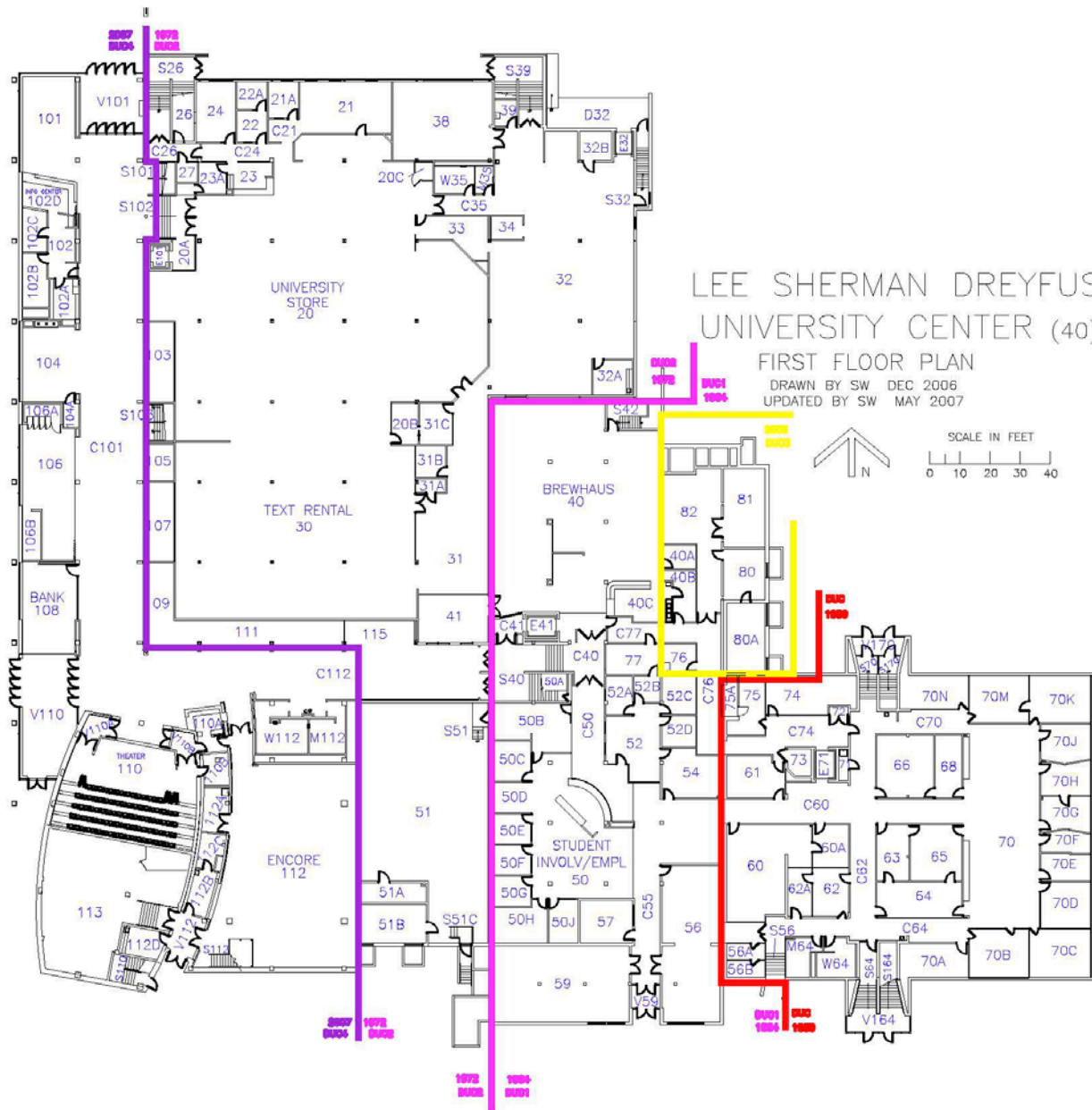
UWSP Facilities Planning

Noel Fine Arts Center

Second Floor

Bldg No: 0009





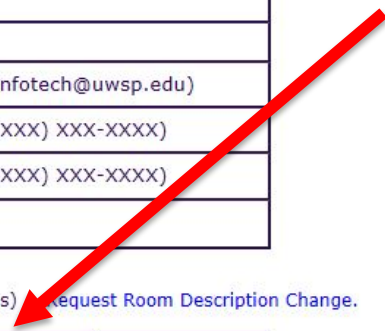
A new student information system is coming soon! Click here to learn more.

 University of Wisconsin-Stevens Point
Dept. Information Managers System

Facilities Planning

- Manage Dept. Info.
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Department Phone	<input type="text" value="(715) 346-2781"/> (example: (XXX) XXX-XXXX)
Department Fax	<input type="text" value="(715) 346-2447"/> (example: (XXX) XXX-XXXX)
<input type="button" value="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
<input type="checkbox"/>	M & M	0125B	PLNNG DIRECTOR	<input type="text"/>	<input type="text" value="v"/>
<input type="checkbox"/>	M & M	0135	PLAN ROOM	<input type="text"/>	<input type="text" value="v"/>
<input type="checkbox"/>	M & M	0125A	ASSOC PLANNER	<input type="text"/>	<input type="text" value="v"/>
<input type="checkbox"/>	M&M Addn 2	0125	FACILITIES PLAN	<input type="text"/>	Main Office <input type="text" value="v"/>

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 **University of Wisconsin-Stevens Point**
Dept. Information Managers System

Facilities Planning

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<input type="checkbox"/>	M & M	0135	PLAN ROOM	<input type="text"/>	<input type="text" value="v"/>
<input type="checkbox"/>	M & M	0125A	ASSOC PLANNER	<input type="text"/>	<input type="text" value="v"/>
<input type="checkbox"/>	M&M Addn 2	0125	FACILITIES PLAN	<input type="text"/>	Main Office <input type="text" value="v"/>



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
<input type="checkbox"/>	0100 - GROUNDS EQPMNT			GROUNDS EQPMNT	
<input type="checkbox"/>	0100 - ROOF			ROOF	
<input type="checkbox"/>	0100A - SMALL EQUIPMENT			SMALL EQUIPMENT	
<input type="checkbox"/>	0101 - AUTO MECHANIC			AUTO MECHANIC	
<input checked="" type="checkbox"/>	0101A - AUTO SHOP OFFIC			AUTO SHOP OFFIC	
<input type="checkbox"/>	0101B - SECONDARY ELECT			SECONDARY ELECT	
<input type="checkbox"/>	0101C - PRIMARY ELECT			PRIMARY ELECT	
<input type="checkbox"/>	0102 - MECHANICAL ROOM			MECHANICAL ROOM	
<input type="checkbox"/>	0103 - STAIRWAY			STAIRWAY	
<input type="checkbox"/>	0103 - GROUNDS STORAGE			GROUNDS STORAGE	
<input type="checkbox"/>	0104 - STAIRWAY			STAIRWAY	
<input type="checkbox"/>	0104 - GRNDS/CUST SPRV			GRNDS/CUST SPRV	
<input type="checkbox"/>	0104A - GRNDS INTERN			GRNDS INTERN	
<input type="checkbox"/>	0105 - CORRIDOR			CORRIDOR	
<input type="checkbox"/>	0105 - IRRIGATION EQPM			IRRIGATION EQPM	

Update Department Rooms

Back to Department Information



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

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Dept. Information Managers System

Facilities Planning

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

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<input type="checkbox"/>	M & M	0135	PLAN ROOM	<input type="text"/>	<input type="text" value="v"/>
<input type="checkbox"/>	M & M	0125A	ASSOC PLANNER	<input type="text"/>	<input type="text" value="v"/>
<input type="checkbox"/>	M&M Addn 2	0125	FACILITIES PLAN	<input type="text"/>	Main Office <input type="text" value="v"/>

Clipboard: Paste, Cut, Copy, Format Painter

Basic Text: Calibri, 14, Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Decrease Indent, Increase Indent

Names: Address Book, Check Names

Include: Attach File, Attach Item, Signature

Adobe Send & Track: Attach File via Adobe Send & Track

Tags: Follow Up, High Importance, Low Importance

Send

From: crasmuss@uwsp.edu

To: room.desc.change.request.list@uwsp.edu

Cc:

Subject: Change Room Description Request

Type your room change request here



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 **University of Wisconsin-Stevens Point**
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Facilities Planning

-

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<input type="checkbox"/>	M & M	0125A	ASSOC PLANNER	<input type="text"/>	<input type="text" value="v"/>
<input type="checkbox"/>	M&M Addn 2	0125	FACILITIES PLAN	<input type="text"/>	Main Office <input type="text" value="v"/>

-

DIMS

Updates and Room Change Requests

Carl Rasmussen
UWSP Dir. Facilities Planning



HR Staff

GENERAL HR, ONBOARDING, BENEFITS, AND PAYROLL



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



Recruitment

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

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

The screenshot shows the Human Resources website for the University of Wisconsin-Stevens Point. The main heading is "Human Resources" with a sub-heading "University of Wisconsin-Stevens Point > Human Resources > Recruitment / Hiring Process". On the left is a navigation menu with items: Home, Prospective Employees, Starting at UWSP, Benefits, Employee Relations, Equity, Affirmative Action, & Title IX, Payroll, Recruiting, About, and Recruitment/Hiring Process. The "Recruitment / Hiring Process" section is highlighted with a red box. The main content area is titled "Recruitment / Hiring Process" and includes a section "Checklists to Look at Before Starting a Search:" with three links: "Checklist Summary for Faculty/Academic Staff Hiring Process", "Checklist Summary of Adjunct Hiring Process", and "Checklist: University Staff Supervisor Recruitment Checklist". Below this is a "Forms" section.

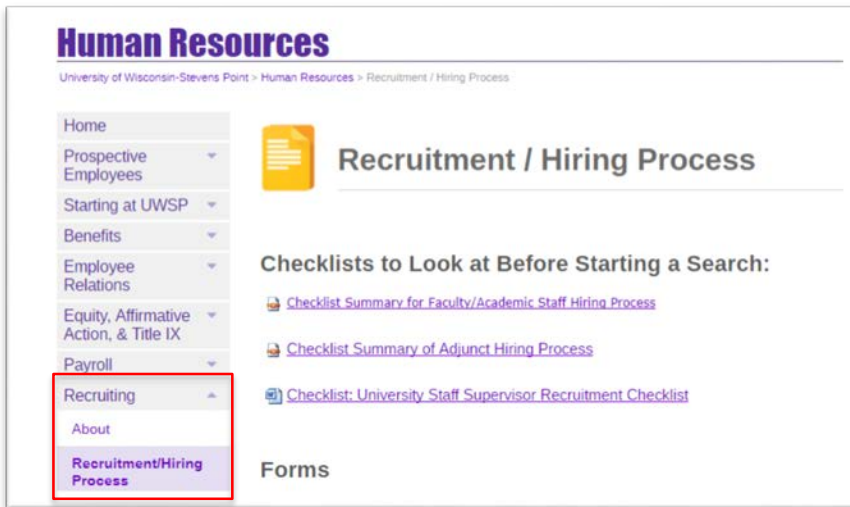
The screenshot shows a "BACKGROUND CHECK RELEASE FORM" with the word "CONFIDENTIAL" in red below it. A red oval highlights two input fields: "Department Number to Charge:" and "Supervisor to Contact:". The fields are currently empty.



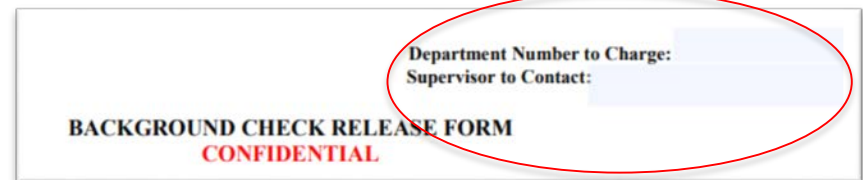
Recruitment

- Where to Find Forms
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 - Supervisor/Account
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The screenshot shows the Human Resources website for the University of Wisconsin-Stevens Point. The main navigation menu on the left includes: Home, Prospective Employees, Starting at UWSP, Benefits, Employee Relations, Equity, Affirmative Action, & Title IX, Payroll, and Recruiting. The 'Recruiting' menu is expanded, showing 'About' and 'Recruitment/Hiring Process', which is highlighted with a red box. The main content area is titled 'Recruitment / Hiring Process' and includes a section for 'Checklists to Look at Before Starting a Search:' with three links: 'Checklist Summary for Faculty/Academic Staff Hiring Process', 'Checklist Summary of Adjunct Hiring Process', and 'Checklist: University Staff Supervisor Recruitment Checklist'. Below this is a 'Forms' section.



The screenshot shows a 'BACKGROUND CHECK RELEASE FORM' with the word 'CONFIDENTIAL' in red text below it. A red oval highlights two input fields: 'Department Number to Charge:' and 'Supervisor to Contact:'. The form is otherwise blank.



Lisa Schaufenbuel

PERFORMANCE MANAGEMENT



Recruitment

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

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

The screenshot shows the Human Resources website for the University of Wisconsin-Stevens Point. The main heading is "Human Resources" with a sub-heading "University of Wisconsin-Stevens Point > Human Resources > Recruitment / Hiring Process". A left-hand navigation menu includes links for Home, Prospective Employees, Starting at UWSP, Benefits, Employee Relations, Equity, Affirmative Action, & Title IX, Payroll, and Recruiting. The "Recruiting" menu is expanded, showing "About" and "Recruitment/Hiring Process", which is highlighted with a red box. The main content area is titled "Recruitment / Hiring Process" and lists "Checklists to Look at Before Starting a Search:" with three links: "Checklist Summary for Faculty/Academic Staff Hiring Process", "Checklist Summary of Adjunct Hiring Process", and "Checklist: University Staff Supervisor Recruitment Checklist". A "Forms" section is also visible at the bottom.

The screenshot shows a "BACKGROUND CHECK RELEASE FORM" with the word "CONFIDENTIAL" in red text below it. A red oval highlights two input fields: "Department Number to Charge:" and "Supervisor to Contact:". The fields are currently empty.



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



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

622298

PERSONNEL APPOINTMENT FORM
UNIVERSITY OF WISCONSIN-STEVENS POINT

NAME: George EMPL ID NUMBER: 00
Home Address: _____ Telephone Number: _____
TITLE: Associate Lecturer Title Code: D80FN
Department: _____
Gender: _____ Education Code: _____ Experience Credit (if new hire): _____

SECTION I: APPOINTMENT ACTION
Check one: New Appointment Change Appointment Summer Appointment Reappointment
 Other (Please Explain): _____
Beginning Date: 08/28/17 End Date: 01/11/18 FTE/Credits Semester I: _____
Beginning Date: _____ End Date: _____ FTE/Credits Semester II: _____

BASE SALARY:
AMOUNT: _____ Fund _____ Program _____ Account _____ %
AMOUNT: _____ Fund _____ Program _____ Account _____ %
AMOUNT: _____ Fund _____ Program _____ Account _____ %
Total Salary: _____ TOTAL % must = 100%

SECTION II: OTHER PAYMENT
Check one: Overload Appointment (work not part of normal job duties)
 Additional Appointment (work part of normal job duties)
Beginning Date/End Date: _____ FTE & Number of Credits: _____

BASE SALARY:
AMOUNT: _____ Fund _____ Program _____ Account _____ %
AMOUNT: _____ Fund _____ Program _____ Account _____ %
AMOUNT: _____ Fund _____ Program _____ Account _____ %
Total Salary: _____ TOTAL % must = 100%

Explanation of activity: _____
Signature (required if overload): _____ Date: _____

SECTION III: LEAVE
Beginning of Leave: _____ End of Leave: _____ % of Leave _____
Reason: Personal Maternity/Paternity Medical Sabbatical Educational Professional
OTHER (Please Explain): _____

SECTION IV: TERMINATION
Effective Date: _____ REASON: Resignation Retirement Deceased Non-Retained
OTHER (Please Explain): _____

SECTION V: AUTHORIZING SIGNATURES
Chair/Assoc. Dean/Director: _____ Date: _____
Dean: _____ Date: _____
Vice/Asst. Chancellor: _____ Date: _____
General Ledger/Controller: _____ Date: _____
Budget Director: _____ Date: _____



Lisa Schaufenbuel

OFFBOARDING



Home

Prospective Employees

Starting at UWSP

Benefits

Employee Relations

Equity, Affirmative Action, & Title IX

Payroll

Recruiting

HRAA Initiatives

Organizational Development

About

On-boarding

Career Development

Leadership Development

Performance Management

Off-boarding

Off-boarding

Off-boarding is the process of preparing the employee, supervisor, and other specific personnel for an employee's separation from the institution as a whole or from a specific department.

Thinking about Retirement?

Visit [UW System's retirement preparation page](#).

Leaving a Position at UW-Stevens Point?

If you are taking on a new position within or outside of UWSP, please feel free to use the template below to resign from your current position. If you prefer to write your own resignation letter, please do so. Please include all of the pieces requested in the template to help ensure that your separation is processed appropriately.

[Resignation Letter Template](#)

*Note: A couple of the fields have labels descriptions for convenience, these labels do not print

Off-boarding Resources

Additional draft checklists for an employee and supervisor/department are available. Contact Lisa Schaufenbuel at lschaufe@uwsp.edu or x2804.

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

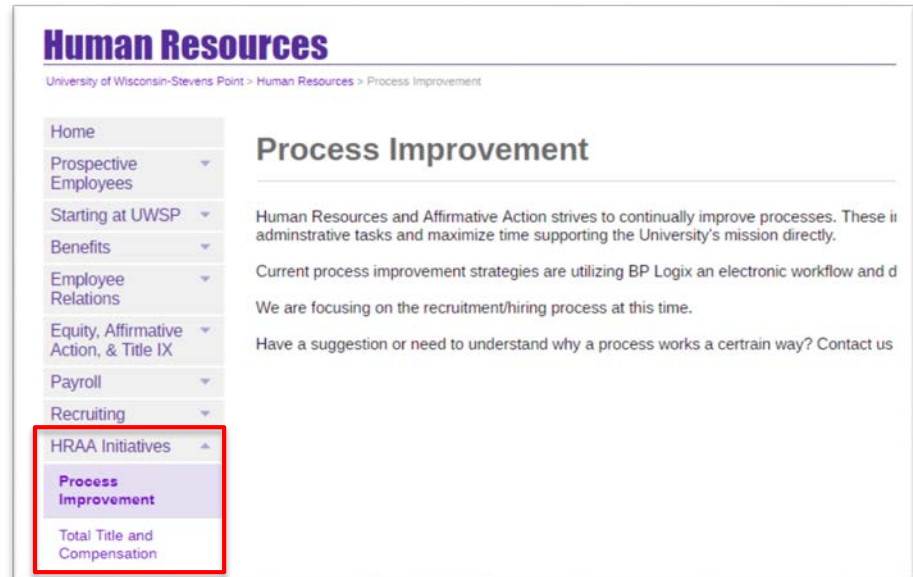
HRAA INITIATIVES



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



The screenshot shows the 'Human Resources' page for the University of Wisconsin-Stevens Point. The page title is 'Human Resources' and the breadcrumb trail is 'University of Wisconsin-Stevens Point > Human Resources > Process Improvement'. On the left, there is a navigation menu with the following items: Home, Prospective Employees, Starting at UWSP, Benefits, Employee Relations, Equity, Affirmative Action, & Title IX, Payroll, Recruiting, HRAA Initiatives, Process Improvement, and Total Title and Compensation. The 'HRAA Initiatives' menu item is highlighted with a red box, and its sub-menu is expanded to show 'Process Improvement' and 'Total Title and Compensation'. The main content area is titled 'Process Improvement' and contains the following text: 'Human Resources and Affirmative Action strives to continually improve processes. These administrative tasks and maximize time supporting the University's mission directly. Current process improvement strategies are utilizing BP Logix an electronic workflow and We are focusing on the recruitment/hiring process at this time. Have a suggestion or need to understand why a process works a certain way? Contact us'.



Questions?



Sally Reese, Parking Services Manager

PARKING



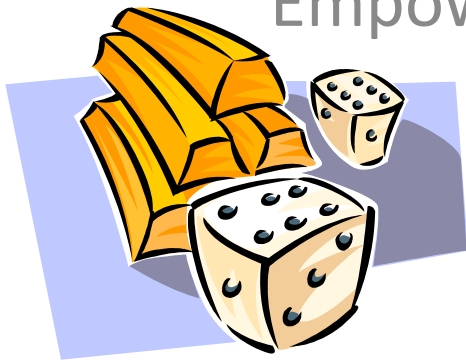
Walter Clark, Director of Risk Management

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 their 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)



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.



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



Vehicle Operations

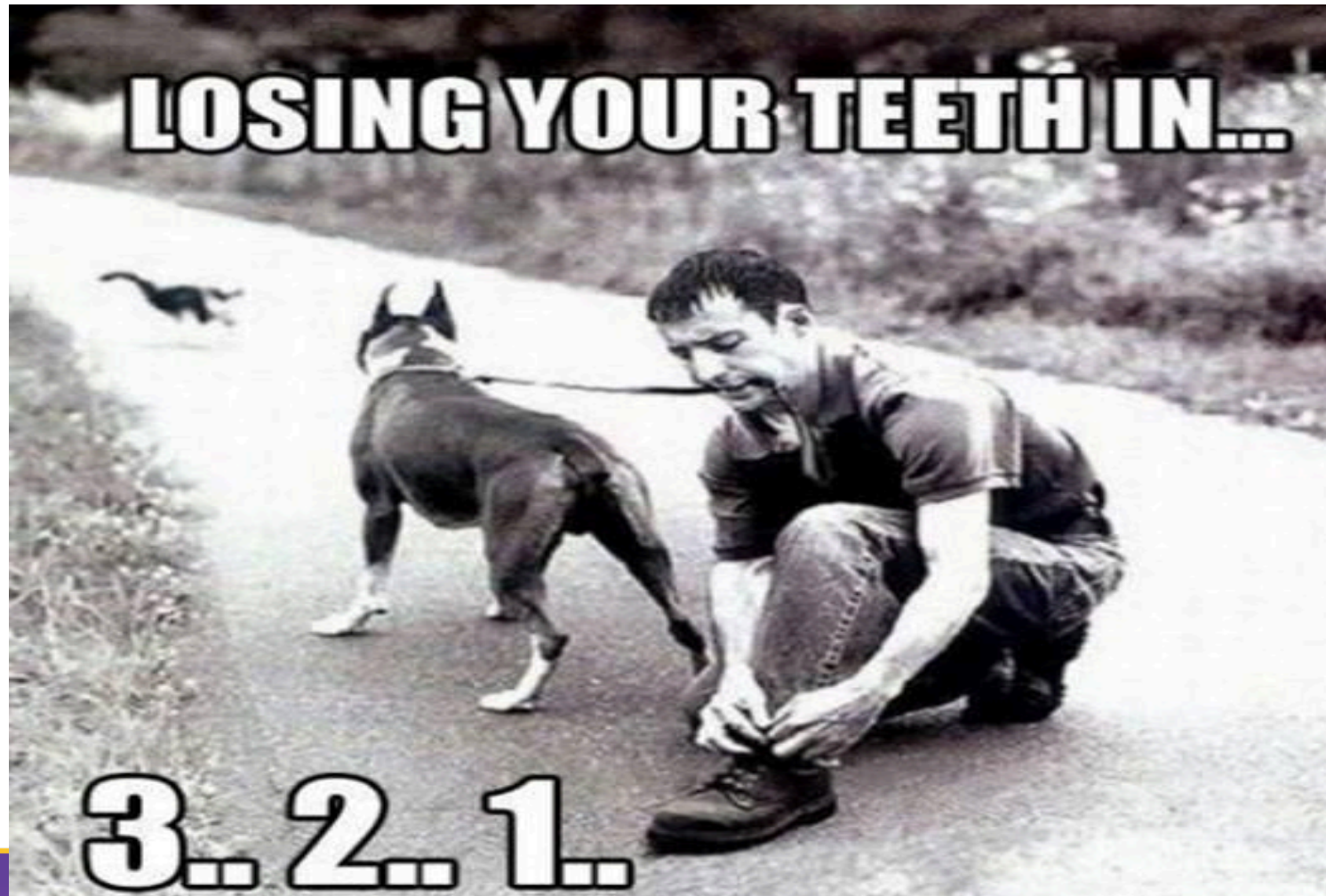
- Safe Driving Habits
- Vehicle Use Agreement
- Road side Assistance
- Report all Incidents



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



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



Property & Liability

- For all UW System 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



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



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

“Non-state employee” passenger require special written permission from risk management



Use of a “Private Vehicle” on State Business

- State will reimburse for State business miles only
- Property damage to a personal vehicle is not 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





Questions?





Lunch

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



Brad Northcraft, Payment Services Manager

PAYMENT SERVICES AND TRAVEL



Payment Services & Travel

ADA/Administrative Workshop

August 24, 2017



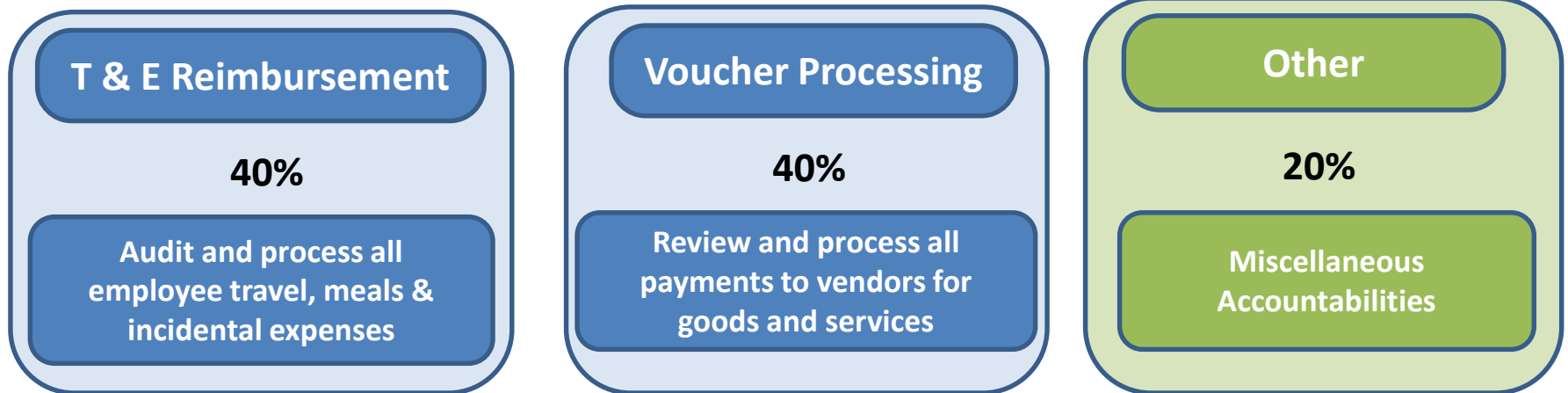
AGENDA

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

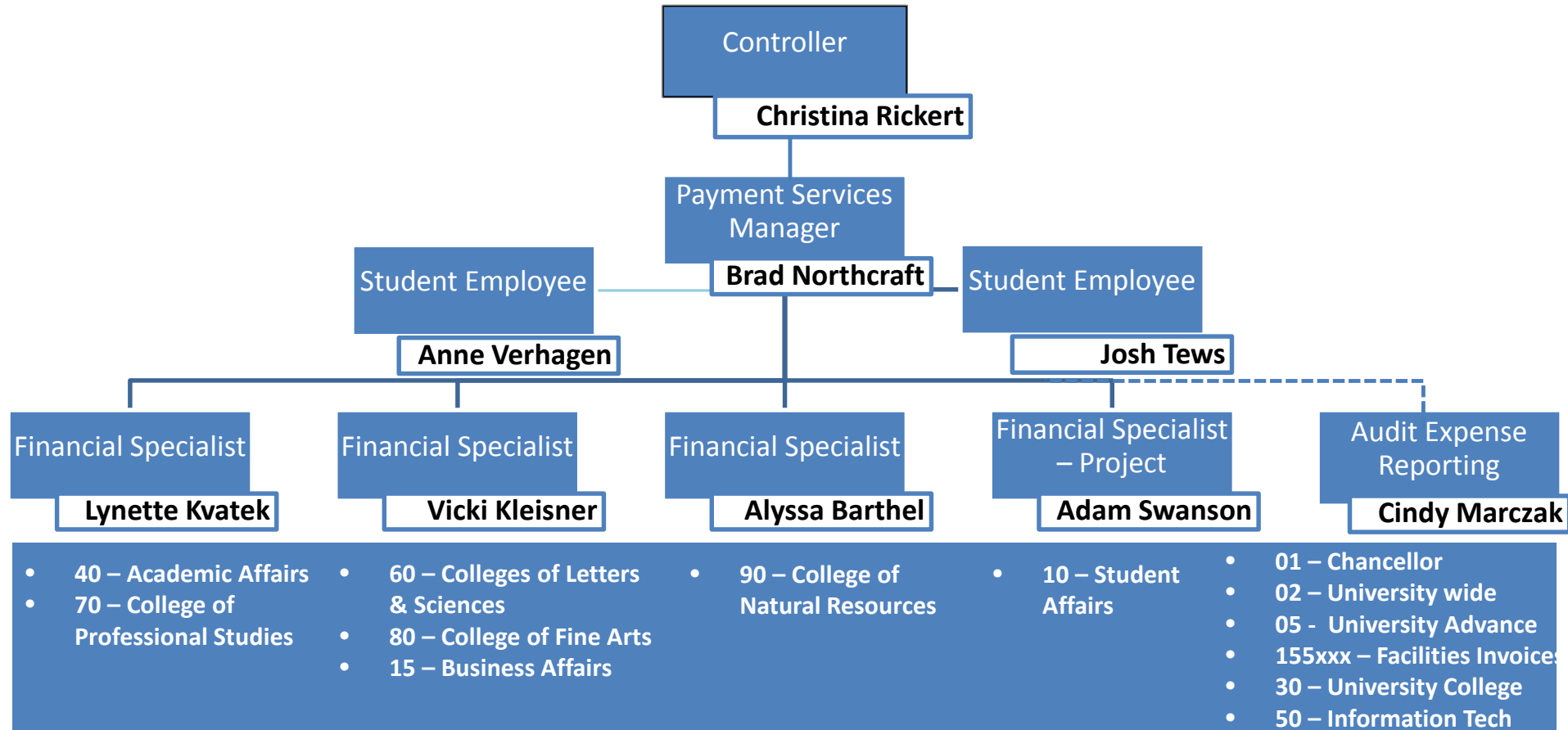


PAYMENT SERVICES ACCOUNTABILITY OVERVIEW

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.



PAYMENT SERVICES RESPONSIBILITY ASSIGNMENTS



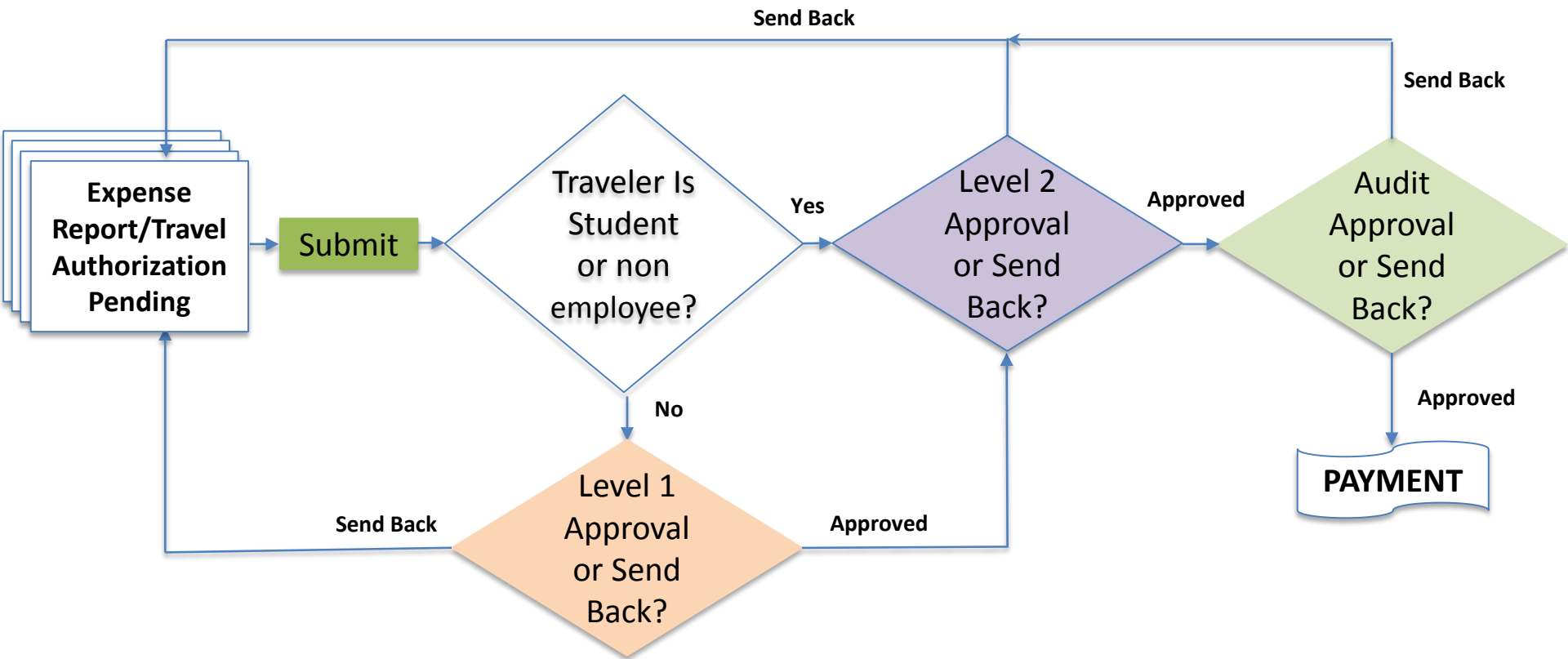
Voucher Processing

- 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

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



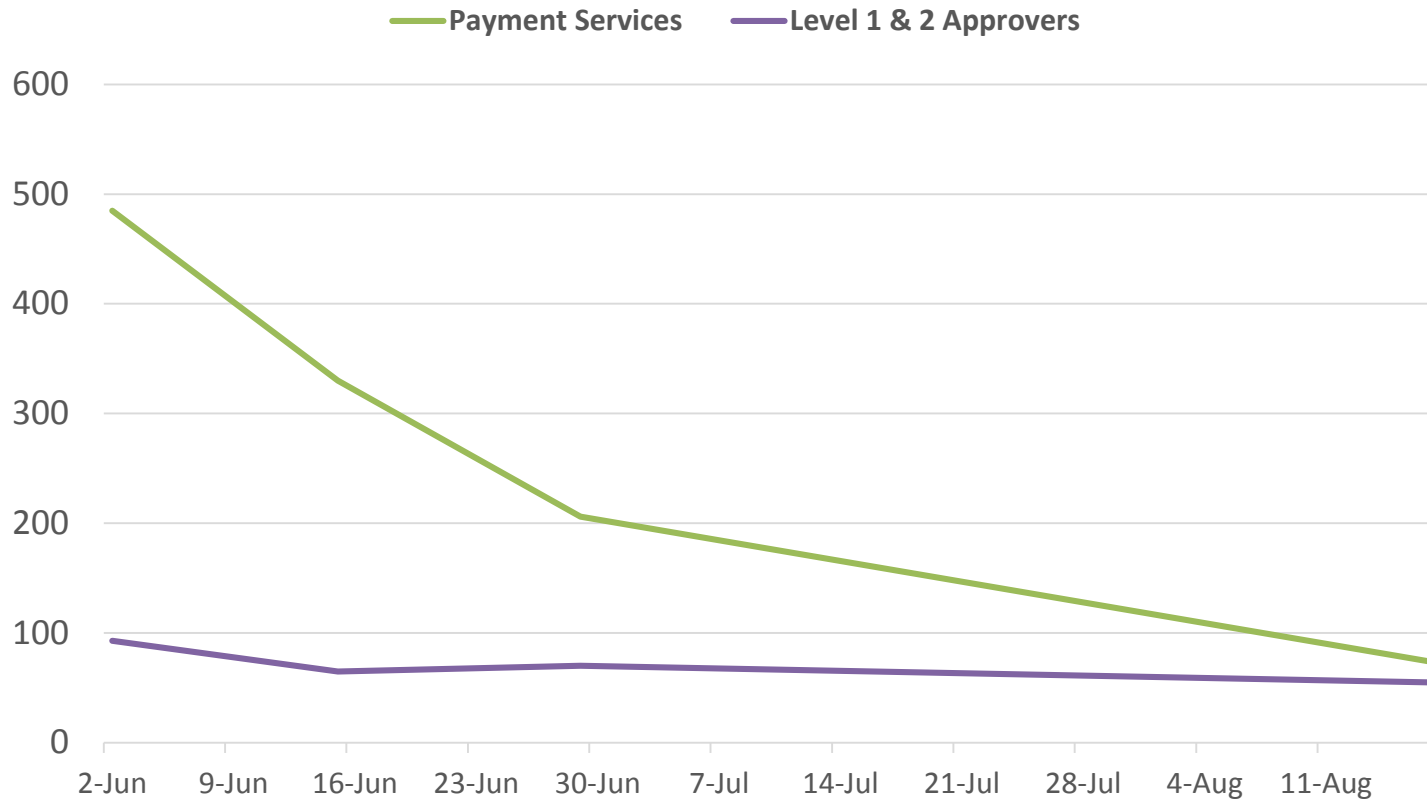
Top 5 REASONS FOR SEND BACKS

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 paid 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 19 th 1- 3 pm Thur 21 st 1- 3 pm	Thur 19 th 1 – 3 pm	Thurs 16 th 1 – 3 pm
Advanced	Tue 26 th 9-11 am Thur 28 th 1– 3 pm	DUC Room 374	



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



Purchasing Card Program

The State has three Card Programs:

Purchasing Cards – used to make low dollar purchases, for official use only. See Purchasing 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 Payment Services for this card.

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

Most Important –
READ THE MANUAL.

New version available
(draft)

All Needed Forms and
Information are on our
Website



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)



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

Shop & Compare

Go to: [Advanced Search](#) | [Favorites](#) | [Quick Order](#) Browse: [Suppliers](#) | [Categories](#) | [Contracts](#) | [Chemicals](#)



Welcome to Shop@UW for UW-Stevens Point.

Please note that all links listed below open in a new browser window.

Shop@UW News

See [Shop@UW News](#) featuring information for shoppers. Recent posts include:

- [Are You Prepared for Fiscal Year End 2017?](#)
- [Toner and Other Printer Consumables](#)

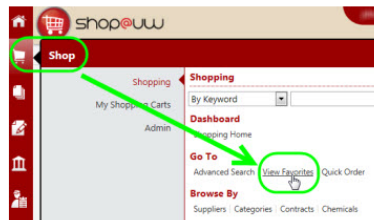
Shop@UW Web Quick Links

- [Contact a Vendor](#) webpage includes:
 - Contact Information
 - Information for Order Details and Returns
 - Shipping Information
 - Quote-to-Order Information (select punch-out suppliers)
- [Tutorial Index](#)
- [FAQ's](#)
- [Shopper Feedback Form](#)

Order Products from the UW-Madison MDS Warehouse

Please [review this web page](#) in order to learn more.

Use the "View Favorites" link to quickly find the MDS Warehouse - Locally Stocked Products Shared Favorites folders. These locally stocked products consist of items from categories such as paper products, janitorial supplies, laboratory supplies, office supplies, maps and guides.



Shop at a Hosted Supplier Catalog

	 Hazmat Fees May Apply				 Locally-Stocked Products
	 Pipetting 360°	 Shipping Not Included			 Shipping Not Included
			 Shipping Not Included		 Shipping Not Included

Shop at a Punch-out Supplier Site

	 INK SOLUTIONS Ink & Toner	 Shipping Not Included		 Shipping Not Included	
		 Shipping Not Included		 Shipping Not Included	

Leave Shop@UW to External Links

 Chairs & Office Furniture	 Design, Fabricate, Repair	
-------------------------------	-------------------------------	--



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 surplusizing equipment, complete [Transfer/Trade-In Form](#).



Gifts-In-Kind

- BEFORE any gift can be accepted:
 1. "Acceptance of Gift-In-Kind" Form 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



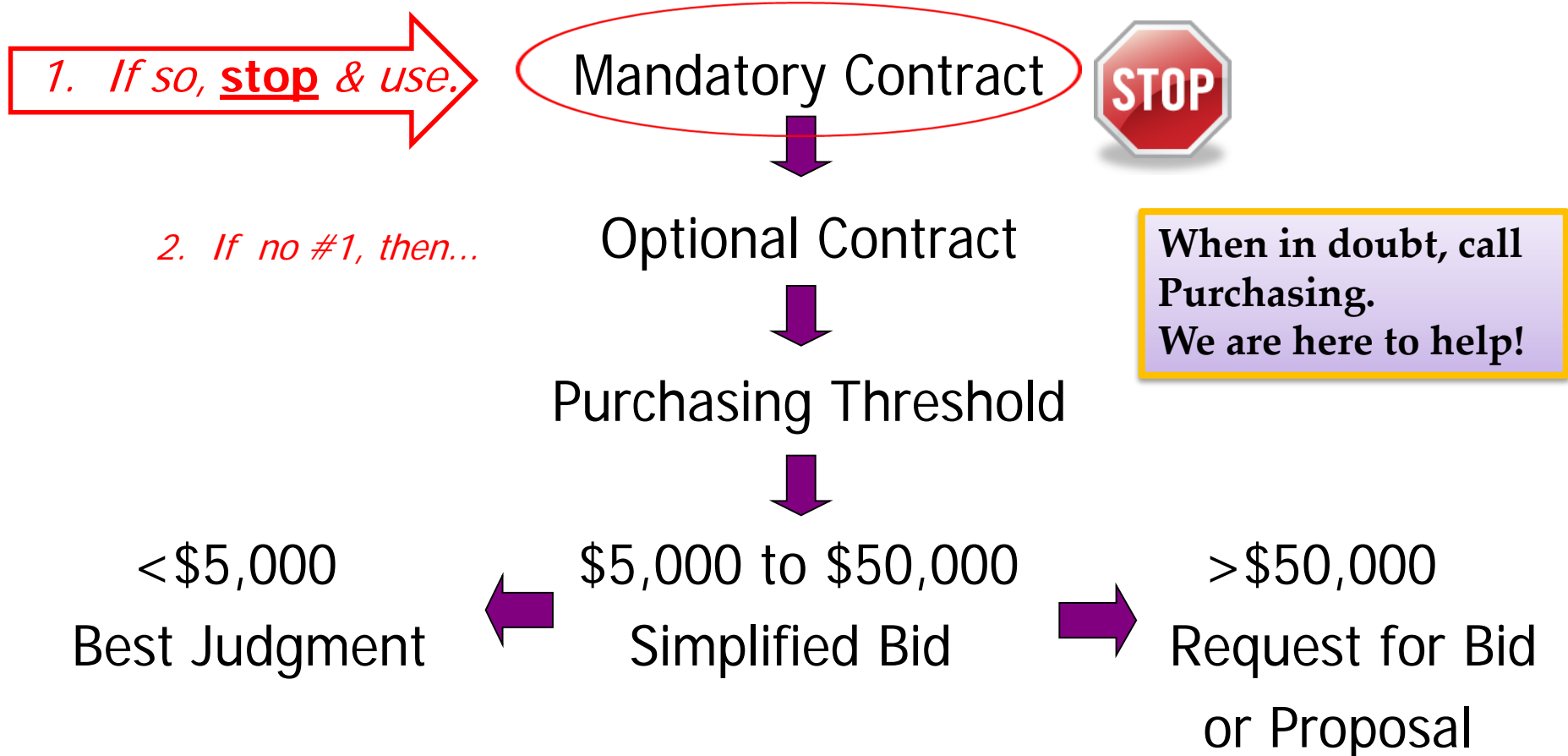
State Purchasing Concepts

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



Purchasing Decision Tree . . . General Guidelines



These are the basics, be sure to review all the factors!
(some key factors on the next page)

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.



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.



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.



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




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.

 University of Wisconsin Stevens Point		ACADEMIC SUPPORT SERVICE AGREEMENT OR PERSONAL SERVICE AGREEMENT <small>ASSA Personal Service</small>
<small>This agreement is entered into between the Board of Regents of the University of Wisconsin System on behalf of the University of Wisconsin-Stevens Point (UWSP) and (hereafter Contractor):</small>		
Contractor's Name _____		SSN/TIN/EIN - W9 sent via fax (715-346-4011)
Business Name (if applicable) _____		Check if faxing or mailing in.
Address _____		Check in already on file with UWSP.
City/State/Zip _____		Indicate Visa Status if not U.S. citizen _____
PERFORMANCE PERIOD		COMPENSATION INFORMATION
Beginning Service Date _____		Fee not to exceed \$ _____ Expenses not to exceed \$ _____
Ending Service Date _____		List expenses to be paid in Scope of Service section.
Location (Bldg., Room) _____		Check if Travel Expenses are included in fee (paid by Contractor).
		NOTE: Travel Expenses reimbursed as separate payment will be limited to State of Wisconsin reimbursement rates.
PAYMENT TERMS		LIAISON
Payment will be made within 30 days upon completion of services and receipt of invoice, or other (please specify): _____		Represents the UWSP's interest and related considerations as outlined in this agreement.
		Liaison's Name _____
		Department _____
		Phone/Email _____
SCOPE OF SERVICE (Identify type of service and expenses as well as any conditions. Attach appendix if needed): _____		
CONTRACTOR ACCEPTANCE I agree to the terms above and the Standard Terms and Conditions found at ASSA-Personal Service Agreement link at www.uwsp.edu/purchasing . I verify that I am duly qualified and willing to perform the services as an independent contractor. The fees under this Agreement do not exceed my normal and customary rate. I certify that the Social Security Number or Federal Employer Identification Number provided is correct. I am not a current University of Wisconsin System employee.		
CONTRACTOR'S SIGNATURE _____		DATE _____
UNIVERSITY OF WISCONSIN-STEVENS POINT ACCEPTANCE: The services to be provided are essential, reasonable and conform with applicable State Statutes and UW System policies and cannot be provided by current UW System employees.		
LIAISON'S SIGNATURE _____		DATE _____
DEAN / DEPARTMENT CHAIR and/or BUDGET MANAGER'S _____		
SIGNATURE APPROVAL: _____		DATE _____
PURCHASING MANAGER (CONTRACTING OFFICER) _____		DATE _____
Contractor and Contracting Officer should sign (and initial where necessary) an original copy of the agreement. The Contractor, the UWSP Liaison and the UWSP should retain a digital copy of the agreement with original signatures.		
Agreement No. _____		



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.



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.



What additional comments
and questions do you have?

**Thank you for your
Participation!**



Dave Barbier, Sustainability Coordinator

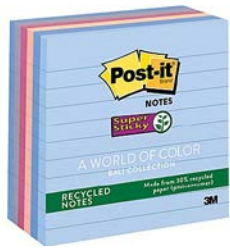
SUSTAINABLE PURCHASING



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

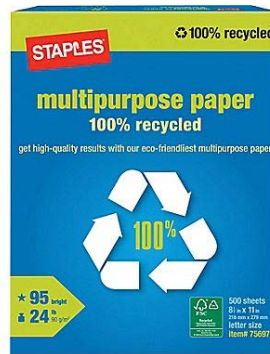
- Packaging 25% post-consumer recycled plastic; label 20% recycled paper, printed with soy inks, and uses a natural rubber adhesive
- 88% natural glue formula is made from plants, a rapidly renewable resource



B2P Ball point pens made from recycled bottles



Zebraite Highlighters made from 74% post-consumer waste



100% Recycled Paper



100% Recycled Paper Clips



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



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



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



Account Code

- Budget
 - Major Class
- Type
 - Asset
 - Expense
 - Liability
 - Revenue
- Assigned by Financial Operations Staff



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



Questions



Contact Information

Robyn Bolton

Assistant Controller

Old Main Building – Room 001A

rlbolto@uwsp.edu

(715) 346-4691



References

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



Kari Thompson, Fiscal Manager

CASH MANAGEMENT



Cash Management

Cash Handling Policy and Procedures

Kari Thompson, Fiscal Manager



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.



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: _____	Source of Funds: _____	Bursar	
Department: _____	Dept Reference #: _____	Receipt	
Bldg & Rm # _____ Ext: _____	Date to Bursar: _____	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:	\$ -	\$ -	\$ -	\$ -	

Please use and fill out completely
when making deposits.

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	



University of Wisconsin
Stevens Point

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.

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

Safekeeping and Depositing of funds:

- DAILY INTERNAL CONTROLS:



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.



Sean Ruppert, Instructional Technology Support Services - CITL

ONE DRIVE





Questions?





We want your feedback!

Please watch your email for a survey to complete.

