University of Houston Clear Lake

Business Administrator Meeting – Recap Notes

January 13, 2023, at 10 am

Recreation and Wellness Center, Room 263

1. **Deja: Introduction**
   - Welcome to our team:
     - Yolanda Edmond – Associate VP, Chief Human Resources Officer
     - Miriam Rouziek – CBA, College of Human Sciences and Humanities
     - Richard Stebbins – DBA, Administration and Finance (Planning & Budget)
     - Rhonda Warner – Accountant II, Sponsored Programs

2. **Agenda Items:**

   1) **Mark Denney:** The future of Business Administration at UHCL, getting in compliance with SAM 03.A.31: Business Administration.

   College admins met with Mark a few months ago regarding concerns, namely regarding the change in leadership and processes campus-wide, as well as the number of turnovers in key staff members. As a result of all these factors, UHCL is challenged with the consistency of campus business practices.

   What is our authority to make proposed changes?

   SAM 03.1.31: Business Administration – this policy primarily applies to the U of H, but not necessarily the other campuses in the system. We will need modifications and work with the UHS to refine this policy and make it specific to UHCL.

   Responsible Manager: Direct reporting line

   Administration and Finance: No reporting line, but establishes roles, responsibilities, and evaluation metrics.

   The Chief Business Administrator of each division will be involved in hiring, terminating, evaluating, and compensating all business admins within their respective divisions.

   The College/School Business Administrators will be involved in hiring, terminating, evaluating, and compensating all business admins within their respective colleges/schools.

   The respective VP and respective dean/Assoc. Provost for Finance and Admin will develop performance goals and measures.

   What problem does this address?

   We need to improve training and support and ensure that we are providing training that is comprehensive, consistent, and supported by documentation. We will work with HR, Planning & Budget, and Business Operations to develop this.

What is our solution?

Step 1: Clear delineation of duties

For all major business processes, define who has what role, etc.

- By position (ex. Admin Asst, Dept. Asst, Business Admin)
- What is their role in each process? (Collect all necessary documentation, data entry, and approval)
- Assignment by position #. No one can re-classify without them coming through the VP of A&F's approval.

Step 2: Ensure we have the training and our processes are documented:

- On-Boarding training: what needs to occur in the first 90 days
- On-going: Annual refresher and determining what kind of career development training needs to occur
  - Who is providing the training?
  - How will the training be facilitated?

Step 3: Performance metrics - Simple, direct metrics to evaluate: (examples are still in development)

- Did they attend training? Did they pass tests demonstrating understanding?
- Rejected documents due to errors
- Time to complete – average time to complete steps
- Tied to annual Performance Assessment and Merit

*Business Admins will help guide us and make these determinations.

Next Steps:

- Review the Business process list and provide feedback on roles as currently presented

- Help identify positions so that for every division, unit, and department we have assigned support from: CBA (no title change, just identification), Business Admin (in smaller divisions, CBA and DBA are the same), Dept Asst and Administrative Asst. (can support more than one dept)

- Future: Explore other paths to improve and guide general business practices and processes for efficiency and operational improvement

Ongoing:

- Work with the Division of Admin and Finance to ensure we:
  - Maintain clarity of positions (by Position #) with the business process responsibilities
  - Review and collect performance metrics that are appropriate and properly inform managers
  - Identify and ensure that those positions are attending training, and reporting when remediation appears to be needed.

- Implementation of this should give the DBA/CBAs the capacity to truly become Financial Managers within their Division or Unit

*Action item: We will add Sponsored programs to the VPAF distribution list.
There will be a deadline to submit all feedback

2) **Erika De Leon and Abby Varela:** Onboarding Process for New hires (checklist and ePARs).

Follow-up from the last meeting: For the security reports, Abby runs a campus-wide HRIS report. This report cannot be printed in a spreadsheet since it contains so much data (approx. 200 pages per department). It will be the responsibility of each department to decipher the data and narrow it down. The HRIS reports show who has access to what portals and what functions. It depends on job function and role. Pulling the HRIS reports can be a very cumbersome task and it is not available in Excel. Abby suggests being very specific when requesting data. If you know whom you are trying to find data for, you can filter through this data. Send screenshots of favorites or the security access tree to help the HR team. Avoid mirroring security access since this can complicate matters further.

To be continued: At the next meeting, Erika and Abby should have an update regarding guidance from HRIS.

The onboarding process for new hires: HR recently had an adjunct who was upset because she did not get paid for teaching the fall semester. It turned out that said adjunct was granted access to the teaching portals, but had not completed the required training (that needed to be completed within 30 days of hire) and was thus not in the system.

HR is proposing that before anyone works, departments need to set deadlines for new hires to complete all of their training and submit required documentation. No one should be able to work if they have not submitted an I-9 and they are not in the system. **Abby will be sending out a process checklist to ensure consistency across the campus.** (UPDATE 1/24/2023: Abby heard back from HRIS and the large security report I spoke about in the meeting is the only way to review what access employees are currently assigned in PeopleSoft).

Yolanda Edmund is currently trying to fully understand the HR onboarding process before she begins implementing an improvement plan. Tweaks are needed to prevent challenges and possible turnover.

3) **Krista Buckminster:** Beginning of Budget Development (FY24) and Base Budget journals deadline.

The deadline to make Base budget journal updates is Wednesday, Feb. 15th. This is if you want to make any updates for FY 23 that will carry over to FY 24. **Tentative date the Budget development portal will open: Wed. March 1st**

Coming soon: Hyperion training sessions. A training schedule has not been sent, but more info will be communicated. You will be granted with access to the Hyperion portal after attending and completing the training.

Contact Krista if you need help with getting Hyperion access or updating access. Krista will send out an updated document that Deja reviewed.

4) **Rosie Pineda:** Accounts Payable practices in Concur Training

The AP & Travel team is in the middle of the Concur project. They are super busy and in a lot of Teams meetings and training throughout the week. Please bear with the AP & Travel staff during this transitional period. This is expected to last until about April 2023.

Mark: As a reminder, the correct account code structure starts at the requisition level. Initiators are responsible. We will work on tools to make this process easier.

Deja: We are partners in the process. Business admins have multi-faceted roles. We can't be experts in everything, but we should ask questions instead of just guessing the codes for certain expenses.

Chief Miller: until processes are fine-tuned, use the Account code Excel sheet to help with this process.

Use Control + F, and search through the Excel account code sheet and it will filter it out into one list.

5) **April Felan-Butler:** Updated contact for CBO Survival Guide updates

April recently completed a week-long audit of the CBO Survival Guide website to ensure everything was working and made appropriate updates. April will now take ownership of ensuring that the CBO Survival Guide is current. If anyone in the A&F division needs corrections or has updated documents that they would like added to the CBO Survival guide, they will just need to contact April directly or send an email to BudgetOffice@uhcl.edu. Keeping the Survival Guide current will help ensure consistency in business operations across the campus.

Robin will send links to Dr. Sherry Hawn and have her assistant add them to the website.

Next Business Administrator Meeting: Friday, Feb. 10th at 10 am (Location TBA)