SPOTLIGHT

P-Card and Travel Card Document Imaging

Beginning the week of June 11, 2007, departments will be able to upload Expense Reports and supporting documentation to the UHS Finance System for P-Card and Travel Card transactions. Accounts Payable will notify departments by email when they have been give this access.

Instructions for uploading documents and a billing cycle checklist were distributed to business administrators who work with P-Cards and Travel Cards on June 5. These documents, "P-Card/Travel Card Imaging and Billing Cycle Checklist," are also available on the P-Card and Travel Card web pages.

College/Division Administrators have determined which staff will have initial access to upload these documents. The Request for UHS Finance Access Form should be used by College/Division Administrators to request this access going forward.

Since September 2006, departments have maintained Expense Reports and supporting documentation in their files until P-Card/Travel Card document imaging became available. Now that document imaging is available, departments need to scan and upload these documents for the September 2006 through May 2007 billing cycles as follows:

1. Place receipts and other supporting documents behind the associated Expense Report.
2. Verify that the Expense Report has been signed by the cardholder (or card custodian if a department card) and a certifying signatory.
3. Scan and upload the Expense Report and supporting documents for each billing cycle separately for each card.
4. September 2006 through May 2007 Expense Reports and supporting documents should be uploaded by August 31, 2007.

Change to Billing Cycle Checklist distributed on June 5 (Web Version is Updated)

Beginning with the June billing cycle, the Expense Report and supporting documents should be uploaded no later than 30 days after the end of the billing cycle. For example, P-Card documents for the June billing cycle, which ends June 5, should be uploaded by July 5. Travel Card documents for the June billing cycle, which ends June 10, should be uploaded by July 10.

All other items on the Checklist must be completed by the 20th of the same month that the billing cycle ends. For example, tasks for the June billing cycle must be completed by June 20.

Who's Who in Administration & Finance

Who: Loraine Crutchfield - Customer Service Center Specialist 1
Years of UH Service: 16 years
Department: Customer Service Centers /Associate VC/VP Finance
How to Contact me: 713.743.6880 or via email lcrutchfield@uh.edu

Where to find me: 325 McElhinney Hall

When to Call me:
Please call me if you have questions/concerns regarding P.A.S.S., Direct Deposits, Campus meal plans, Employee Verifications, W2's, W4's, and all other HR/Payroll/Finance inquiries.

What I Like Best About My Job:
Interaction with the UH community is what I like best about my job. It's so rewarding to hear customers say "Thanks so much for all of your help."

SPOTLIGHT

Hub Vendor of the Month

WHO:
KJH Consultant Services
President and CEO: Karla J. Horn
KJH Consultant Services is a Houston based company Independent owned.

WHAT:
KJH Consultant Services is a promotional product distributor providing over 800,000 promotional products, awards & trophies, custom silkscreen t-shirts, polo shirts, and embroidery as well as an on-site graphic design department catering primarily to educational institutions, corporate users and small businesses.

HOW:
KJH provides an online catalog for promotional products.
Orders can be placed:
Online at www.kjhconsultant.com
By phone at 713-957-9932
By fax at 713-957-2012
Contact Karla J. Horn at 713-957-9932 for additional information or printed catalogs.

ONE THING ABOUT OUR COMPANY THAT WE WOULD LIKE UH TO KNOW:
We believe in building strong relationships and working closely with the contact person to ensure orders are delivered in a timely matter. We want UH to trust our company. This is why we go the extra mile to ensure we meet your promotional product & graphic design needs.

- Creative IDEAS
- Excellent SERVICE
- Competitive PRICING
- Promotional SOLUTIONS
- Quality PRODUCTS

INTERESTING FACT ABOUT THE COMPANY:
Karla J. Horn, CEO, brings experience in providing quality promotional products to colleges, universities and public schools. KJH Consultant Services offers innovative and unique ideas to the marketplace for recruiting, school spirit wear, fund raisers, sport teams, community events and public relations.

FINANCE

Historically Underutilized Business (HUB) Statistics
University of Houston HUB use for May 2007 = 18.99%

UH System Administration HUB use for May 2007 = 60.62%

Top 16 UH/UHSA Departments with Highest Percentage of HUB Use in May 2007

College/Division	Department	HUB Use	Total Purchased
Graduate College of Social Work	AMERICAN HUMANICS	100.00%	24.76
University Advancement	ANNUAL GIVING	100.00%	1,833.57
Engineering	COOPERATIVE ENGINEERING	100.00%	24.46
Graduate College of Social Work	FIELD OFFICE	100.00%	120.91
Graduate College of Social Work	LEADERSHIP & CHANGE	100.00%	46.37
Academic Affairs	SECURITY AND DISASTER RECOVERY	100.00%	982.75
Academic Affairs	INST - ACADEMIC AFFAIRS	99.91%	450,808.44
Administration and Finance	BUDGET	94.98%	853.35
Administration and Finance	FINANCE	95.01%	2,976.68
Business Administration	FINANCE	91.81%	1,849.74
Graduate College of Social Work	ALUMNI & CAREER SERVICES	87.77%	128.25
Student Affairs	INT'L STUDENT & SCHOLAR SERVICES	86.70%	362.07
Academic Affairs	INSTITUTIONAL RESEARCH	85.40%	2,048.11
Engineering	DEAN, ENGINEERING	85.21%	152,046.12
Technology	DEAN, TECHNOLOGY	82.05%	47,000.82
Academic Affairs	INFORMATION TECHNOLOGY	78.94%	103,292.40

The above percentages include HUB-eligible voucher and P-Card payments for May 2007. However, HUB subcontractor payments are not included in the monthly HUB statistics but are included in the semi-annual and annual HUB reports.

HUB reports by college/division and department are posted on the web here.

See the HUB Vendor Directory for a list of frequently-used HUB vendors.

You can also call Sandra Webb at x35662 or Alan Philips at x35671 if you need help finding a HUB vendor.

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P-Card Contacts

On June 1, Sharon Davis transferred to University Stores following Don Dufresne's retirement on May 31.

Accounts Payable is seeking to fill the vacant AP Manager position left by Sharon. This position will also serve as the P-Card Coordinator, which oversees the administration of P-Cards at the University. Until this position is filled, please contact the following individuals for P-Card questions or issues:

Jonathan Horton x38740 or jhorton@central.uh.edu
Leslie Williams x38702 or ljwilliams@central.uh.edu

Travel Card Contacts

Please contact the following individuals for Travel Card questions or issues

Sandra Silva x35883 or ssilva@cental.uh.edu
Edwin Rodas x38961 or emrodas@central.uh.edu

If you cannot reach one of the above P-Card or Travel Card contacts, please call Samantha Yurus at x38721.

Policy Review

In an effort to streamline the policy review process, there will now only be four quarterly policy review periods to coincide with the four quarterly approval periods.

- The four quarterly reviews will begin on the following dates:
  June 1, September 1, December 1, and March 1

- If a draft document is not ready to enter the review process by these dates it will be held until the beginning of the next review period. If you are sending policy revisions, please keep these dates in mind.

- To assist Subject Matter Experts and the university community, Business Services will provide matrices for the SAMs and MAPPs on the SAM and MAPP web sites. Business Services will also send reminder notices to the policy Subject Matter Experts so that MAPPs and SAMs are consistently updated in a timely manner.

- If the Subject Matter Expert needs to change a policy or procedure prior to the beginning of a review process, they may do so via an interim SAM or MAPP that is approved by the Subject Matter Expert's Vice President and the President or Chancellor. The Subject Matter Expert would then need to follow up with an updated SAM or MAPP to be part of the next review process. Business Services will make every effort to assist the Subject Matter Expert in communicating interim policies and procedures to the College/Division Administrators and departmental business staff, and component university representatives, as appropriate, via the Business Notes & News e-newsletter and the SAM and MAPP Listservs.

If you have any questions about the policy review process or about policies at the System or University, please contact Sara Carter at 3-6885.

The following is a chart, outlining the dates for the Policy Review Process:

	1st Quarter	**2nd Quarter**	**3rd Quarter**	**4th Quarter**
Begin Review	September 1	December 1	March 1	June 1
Cabinet/SEG	October 31	January 31	April 30	July 31
Approval	November 30	February 28	May 31	August 31

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Policy Updates

The following chart provides the current policy updates through May 31, 2007. Official .PDFs of these policies and procedures can be found at www.uh.edu/mapp or www.uh.edu/sam.

Policy Updates as of May 31, 2007

MAPP Name and Number	Date Revised	Change to Policy
MAPP 02.02.05 - Moving and Relocation Expenses	2/28/2007	Updated the IRS Standard mileage rate and changed the procedure for payments made directly to the moving company.
MAPP 05.04.02 - Reconciliation of General Ledger Cost Center Balances	2/28/2007	Modified the time period that a verification report must be retained so that a department now must retain the prior year-end verification and the verifications for all the accounting periods in the current fiscal year.
MAPP 12.01.01 - Scholarship Administration	2/28/2007	Establish criteria for the administration, accounting and stewardship for college and institutionally administered scholarships.

SAM Name and Number	Date Revised	Change to Policy
03.A.12 - Exemptions from State of Texas Taxes	2/28/2007	The exhibits in this document were replaced with links to the Tax Department web site. Also, language was added to state that tax for items purchased for university use may be reimbursed from university funds, with the exception of sponsored project funds.
03.A.15 - Expense Report Preparation	2/28/2007	An expense report may be attached to a voucher as a separate document and signatures required on the expense report may be included on the voucher itself.
03.D.06 - Taxable Fringe Benefits	2/28/2007	Updated the IRS standard mileage rate.
03.G.03 - Financial System Verification of Cost Center Transactions	2/28/2007	Modified the time period that a verification report must be retained so that a department now must retain the prior year-end verification and the verifications for all the accounting periods in the current fiscal year.
03.G.05 - Requirements for Utility Bill Audits	2/28/2007	Updated to change the responsible party from UHS Controller to Associate Vice Chancellor for Finance. The requirement to submit the audit report to the Governor was also removed.

HUMAN RESOURCES

Reminder PCD Checklists are Due Soon

All regular staff employees should receive a formal performance review each year. Please use the current Performance Communication & Development (PCD) forms available on the Human Resources website here. PCD Checklists are due in Human Resources by June 30, 2007.

So far this year, 116 PCD Checklists have been received by Human Resources. We will provide college and division business administrators with updates on the number PCDs received and due during the summer months.

Information about the PCD program and answers to frequently asked questions are on the Human Resources website here. If you have any questions, please feel free to contact your Human Resources Generalist.

Updates for the Authorization to Conduct a Criminal History Record Investigation (CHRI)

In order to maintain compliance with the Fair Credit Reporting Act, the department of Human Resources has worked to update our forms and job processes pertaining to the Authorization to Conduct a Criminal History Record Investigation form (CHRI). While the University has made the changes to assure compliance with the Fair Credit Reporting Act, it is prudent that the applicant knows that the Criminal Background as well as their Residence is verified for employment in security sensitive positions (MAPPS 02.03.05). The applicant's credit history is not taken into consideration for terms of employment.

There are changes in the verbiage of the updated CHRI form such as the spelling out of contractions and some re-wording. The form better clarifies the acknowledgement portion of the form, in that the information obtained through the background check is not used to discriminate against an applicant. Also, that their signature proves that they are aware that any falsifications, misleading information, omissions, or nondisclosures may disqualify them from employment or result in their dismissal if employed.

Individuals with out of state residence history (or histories) whose background check come back positive and we do not hire them (or terminate their employment) will be notified by letter providing explanation, a summary of their rights, and how to contact our third party vendor ACCU-SCREEN. This will then allow the applicant to dispute the findings reported by the vendor and respond directly to them if there has been an error or miscommunication.

Please do the following:

- Visit the HR Forms website to get the updated version of the CHRI form (revision date 5/22/07)
- Destroy/discontinue the use of the older CHRI form

Any questions regarding the CHRI or application process may be referred to the Employment Department of HR at 713-743-5770.