

**Carla Martinez, Central Facilities Service Manager, Facilities Management**

Submitting Key Requests

- Both the certifying signatory for the cost center used to pay for the key request and the certifying signatory who is responsible for the room or building that the key will open must sign the Key Request Form, if not the same person.
- Indicate the room number for which a key is needed, rather than the key number, on the Key Request Form.
- Use the Key Pick-Up Authorization Form to authorize an employee to pick-up another employee's keys from Key Control.
- When an employee leaves a department, keys should be returned to Key Control directly by the employee. The keys should not be transferred to another employee.
- If it is necessary for a department to obtain the keys from an employee because the employee will likely not return the keys to Key Control (involuntary termination, temporary staff, etc.), the department must return the keys to Key Control as soon as possible.
- Carla will ask Human Resources about updating the eTermination Checklist to indicate that building and room keys must be returned to Key Control.
- Carla is currently conducting an inventory of all doors and trying to update FAMIS with all keys that have been issued and returned. Afterwards, she will do an audit of keys issued with help from the CDAs.
- Cris Milligan suggested giving administrators view access to the key list during the key audit, which Carla said she would look into.

**Pam Muscarello, Division Administrator, Division of Research**

DOR Startup Funding Use

- Pam used the attached presentation to explain Division of Research start-up funding, including the steps to apply for start-up funding, appropriate use of start-up funding, and monitoring.
- DOR Bizops handles internal UH awards and start-up funding. This is Pam's area.
- Office of Contracts and Grants (OCG) handles external awards.

**Melissa Abram-Jackson, Talent Management Manager, Human Resources**

**Christine Donovan, Senior HR Training Specialist, Human Resources**

New Training Programs

- Melissa and Christine discussed the Learning and Talent Development (LTD) program.
- The LTD program includes several components:
  - Individual Small/Group Development (1 to 3 people) – coaching, group assessment
  - Team Development – customized workshops
  - Online Development – mandatory training, HR online, SkillSoft, webinars, etc.
  - Leadership Development – five training modules
  - Community Development – lunch and learn monthly “hot topics” with guest speakers
- See the HR LTD website: <http://www.uh.edu/human-resources/LTD/>

College/Division Administrator Meeting Minutes  
March 12, 2015

- The focus of the LTD program is developing employees to be successful, rather than simply on training.

**Devi Bala, Division Administrator, Administration & Finance and Student Affairs**

Discussion: Using P-Cards to Pay Internal UH Vendors

- Devi has noticed that some UH merchants (UH departments that are service centers and auxiliaries) accept credit card payment from other UH departments, instead of accepting payment by SC Voucher. As a result, the UH merchant is incurring a credit card fee for this internal transfer, and it is contrary to MAPP 04.03.01.
- MAPP 04.03.01, Service Center and Auxiliary Purchases, says: “When a University department obtains goods or services from a service center or an auxiliary enterprise of the University, the transaction must be recorded through the use of a Service Center Voucher (SC Voucher).”
- Therefore, departments must use a SC Voucher to pay service centers and auxiliaries. The CDAs were in agreement with this requirement.

**Mike Glisson, Controller**

Travel Management System Update

- Concur and UH Enterprise Systems are nearly finished working on the financial connector between Concur and UH PeopleSoft, which is required to expand the rollout of Concur.
- Mike suggested, and the CDAs agreed, that the supervisor or unit head not be required to approve the Concur Expense Report in electronic workflow for the following reasons:
  - The supervisor/unit head already approved the Concur Travel Request.
  - The certifying signatory and Accounts Payable will review and approve all Expense Reports anyway, so a third approval is probably not needed.
  - Expense Reports have many documentation requirements that some supervisors/unit heads are probably not familiar with.
  - Expense Reports returned by the certifying signatory and/or Accounts Payable to the traveler for correction go back through the supervisor/unit head again for approval a second time, which will frustrate and confuse the supervisor/unit head and delay reimbursement to the traveler.
  - The certifying signatory always has the option of selecting “Approve and Forward” to send an Expense Report that warrants additional approval to the supervisor/unit head. If the supervisor/unit head approves it, the Expense Report will go to Accounts Payable for final approval. Alternatively, the supervisor/unit head can send it back to the traveler for correction.
- Currently, only selected employees are given access to Concur based on who will likely travel, process and approve Travel Requests and Expense Reports, or make travel arrangements. This requires Finance to maintain a list of Concur users and their supervisors, which must be updated by departments submitting a form to Finance to add employees, remove employees, or make changes to supervisors. It would be more efficient if we leveraged the HR System to load all active UH employees and their “Reports To” supervisor into Concur and then update Concur periodically with feeds from the HR System to add/remove employees and change supervisors.

College/Division Administrator Meeting Minutes  
March 12, 2015

- Two possible concerns with loading employees and supervisors from the HR System are:
  - Is there a risk associated with giving employees access to Concur, if they are not travelers, travel arrangers, processors, or approvers?
    - Travel reimbursements through Concur require an approved Travel Request and Expense Report, both of which go through multiple approvals.
  - What if the “Reports To” supervisor in the HR System is not the preferred supervisor who should approve in Concur?
    - The preferred supervisor can be assigned as a delegate approver in Concur to the “Reports To” supervisor, if needed. A delegate approver has the same access to approve as the official approver. Alternatively, the “Reports To” supervisor can use the “Approve and Forward” button in Concur to forward the Travel Request to the preferred supervisor.
- The CDAs agreed with the idea of loading employees and supervisors from the HR System. Mike will work with IT to setup the process.
- Finally, Mike suggested processing Travel Card Expense Reports (Department and Individual) on a monthly basis in Concur, instead of post-trip. Only reimbursements to travelers would be processed post-trip. One reason for this is an IRS requirement to account for all expenses within 60 days of the transaction date in order for the transaction to be considered part of an “accountable plan” (non-taxable to the employee). Mike will work with the pilot departments currently using Concur to make this change to see how it goes.
- Some of the CDAs felt it would be better to roll Concur out to a few colleges/divisions at a time, instead of all at once, which would allow more time for training by Accounts Payable. Mike will take it into consideration.

Purchasing Department Update

- Two Purchasing employees are leaving UH on March 13 for other opportunities.
- Colleges/Divisions have been reassigned to other Buyers until the vacancies are filled.
- Following the meeting, an additional position was approved for Purchasing as well to provide better service and improve compliance with state procurement and HUB requirements.

HUB Vendor Showcase, March 23

- Urban Circle, a marketing and promotional products firm, will give a presentation about their company at the next HUB Vendor Showcase on Monday, March 23, 2015 from 9 AM to 11 AM in the Rockwell Pavilion (MD Anderson Library).
- College/Division Administrators are encouraged to send employees who purchase marketing or promotional items.
- The schedule for the HUB Vendor Showcase is located at: <http://www.uh.edu/administration-finance/hub/events/>
- Contact Maya Thornton, HUB Director, at 713-743-8269 or [mpthornton@uh.edu](mailto:mpthornton@uh.edu) if you have any questions.