

## **Business Process Advisory Group – February 12, 2016 – INSCC Room 110**

### **Attending:**

Alayne Merritt, FBS	Angela Matthes, SOM
Ann Blanchard, UGS	Ann Buffington, ADM
Anna Alindogan, FBS	Anne Maxwell, FAO
Bryce Garner, HU	Carl Larson, FBS
Carol Bierschwale, ARCH	Carrie Brooks, LIB
Chuck Piele, IA	Clay Postma, UIT
Craig Merritt, FBS	Dave Bardsley, PHARM
Dawn Atterbury, FBS	Dean Church, FBS
Elizabeth Woolsey, SOM	Frederic Hon, HU
Gary Snow, FBS	Glendon Mitchell, FBS
Hedy Hu, FBS	James Steffan, MBM
Jane Fong, SOM	Jane Scott, FBS
Jennifer Long-Pratt, FBS	Jeri Schryver, ICSE
Jim Turner, EIHG	Joan Gregory, EHSL
John Levandowski, FBS	Jordan Burr, FBS
Jolene Snyder, FBS	Julie Woodward, FBS
Ken Erickson, FBS	Kevin Ballard, FBS
Kristine Van Ausdal, FBS	Lois Barlow, SOM
Magali Coburn, SCI	Marcia Cook, CSME
Margaret Tennant, DNEUR	Marilyn Burton, SOM
Marjorie Goodrich, IA	Mark Patterson, FBS
Marv Hawkins, USS	Mary Louise Hughes, FBS
Mary Snow, USS	Mary Ann Howard, SCI
Megan Warren, NURS	Michelle Addison, MUSIC
Pam Webb, FBS	Parker Dougherty, LIB
Robert Gray, DFPM	Robin Love, FBS
Sally Petersen, FBS	Sandy Hughes, BUD
Scott Patten, FBS	Shelly Kruger, CPPA
Stacey Oliver, FBS	Sue Wolfe, FBS
Susan Shult, PHARM	Tiffany Baires-Nielson, COE
Yuka James, LAW	

### **e-PAR**

Usage of ePAR's submitted on time is increasing. FY 2016 Q2 had 80.5% ePAR's submitted on time. That is up from 71.6% in Q1. However ePAR's not started went up from 6.5% to 8.5%. Completing ePAR's on time is critical for the University follow Federal and University regulations. [Click here](#) for more details of the 1<sup>st</sup> and 2nd quarters of FY 2016.



## **New P-Card Manager**

Jane Scott is retiring at the end of the month as the **Purchasing Card** Manager. Jolene Snyder has been hired as the new Purchasing Card Manager.

## **TC-721G Tax Certificate**

To help combat fraud attempts, the TC-721G Exemption Certificate for Governments and Schools has been secured on the FBS website. To access the TC-721G form, a user must be accessing it from a location on the University of Utah.

Now, instead of the form opening when you click on the form, a **page opens** with two choices. If the user is on campus, the provided link will open the form. If not a form is provided to request the TC-721G. This request is routed to **Purchasing** who will sent the form to valid requests.

**Click here** for communication about the new process.

## **Cost Transfers**

An **overview** of the Research Management & Compliance office was discussed. Compliance to University of Utah policies and Federal policies is very critical when accounting for money spend on projects. The Cost Transfer process was shown using **flowcharts**.

## **Financial Web Apps Going Red**

Technology is constantly changing. This requires that the Financial Web apps in the FBS pagelet in CIS be updated. This will sometimes change the appearance (little red) of some of the apps. In some cases, added functionality has been added to the app. The following apps (**Newspost**) have already been updated:

- Vendor Lookup
- Voucher Lookup
- PO Lookup

Functionality has been added to the Project and Activity Lookup apps. The ability to Hide/Unhide columns and Search were demonstrated. This is still in a test environment but will be moved to the FBS pagelet in the near future.

## **USHOP**

A discussion was had about different procurement processes. The **Buying and Payment** guide is helpful to understand the best way to make purchases. With the implementation of **UShop**, more processes can be made electronic, eliminating the need for inefficient paper processes. This discussion included the future sun setting of paper forms like LPO's and Paper Requisitions (including Proof Requisitions).

## **Open Discussion**

The new Vendor\Voucher lookup was demonstrated.

*Next BPAG Meeting —March 11, 2016*

