

University of Houston Clear Lake

Business Administrator Meeting – Recap Notes

December 16, 2022

9:30 am

Student Services Classroom Building, Room 2310

Welcome back, DeAngel Bonilla!

New employees:

April Felan-Butler – Admin Assistant II, Planning and Budget office

Darron Johnson – Budget Analyst, Planning and Budget office

Planning & Budget (Deja Sero)

- All management report tools have been updated through November. Reports are to be sent to unit leaders and VPs or the tool can be shared.
- Quarterly reviews are due on Monday, 12/19/2022. We will meet individually to discuss these items.
- CBA/DBA dept list – remember to identify the position/person responsible for cost center reconciliations

VP Mark Denney

- There will be a series of upcoming meetings to review the FY22 results. By division and by funds. Revenue, expense, and net. And by NACUBO functions.
- Ensure items Planning & Budget requests are being fulfilled. Also, connecting who is responsible for tasks and duties is essential to improving workload management
 - We need to clarify roles and then delineate who handles what piece of which process, especially while there have been many vacancies.
- Please have your quarterly reviews completed by the deadline of December 19th

Robin Shannon, Facilities DBA

- Service Center Vouchers are now live for Parking, Facilities, Police, and Event Scheduling. Robin has created documents to assist with entry for each department. If anyone else is currently using IDTs and wants to move the process to SCR vouchers, contact Robin if help is needed to start the process.

Cindy Saltzman, Student Affairs DBA

- Emails have been sent regarding **Concur Travel Cards** from the Travel office.
 - SUGGESTION: separate meeting with Dr. Hawn to clarify the email communication and other Concur questions.

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Human Resources (Erika De Leon)

- As of December 1st, Manual checks will no longer be issued outside of scheduled pay periods, per UHS.
- **THANK YOU** to everyone for completing the Mandatory Training. UHCL reached 100% completion for the 2nd year in a row!
- REQUEST: HR security access information to perform audits
 - Erika will speak with Abby to ensure this can be completed and communicated to all the DBA/CBAs.

Other

- DocuSign is now live and there are training videos. Please visit OIT's website or contact Sheeba Thomas for more training information.
- Management report tool
 - Planning & Budget will be sending out a survey (Feb- April)
 - Be sure to encourage managers to use or read the reports. Review monthly with leaders to develop a sense of what is still missing from the reports or what they like.

Action Items:

-Cindy Saltzman will be contacting Dr. Sherry Hawn to confirm the Travel policies for UHCL staff members.

-Erika DeLeon will follow up with Abby to get the HR Security Matrix and send out the hiring checklist to all department hiring managers. Erika will also confirm what HR needs and share an update at next month's meeting.

-Robin Shannon will get with Rosie to get the departmental SCR voucher procedures uploaded to the website.
