

Classified Connection Meeting
June 14, 2006

Jessica Cole started the meeting by informing everyone of the new **Classified Connection Webpage** located off the Registrar's page "uww.edu/registrar" Navigate to "faculty/staff">"classified connection". http://www.uww.edu/registrar/classified_connection/. This page is a work in progress. Mary Goeglein deserves our gratitude for designing, implementing and maintaining the page. Some of the information found there includes: upcoming meeting information, past meeting notes, a reference area, links to documents, a sample procedure guide, and checklists for things like hiring new faculty and major changes. There is also a link to the committees associated with classified connection.

"Conference for the Office Professional" attendees spoke about sessions they attended and shared some of the knowledge they learned at the conference which was held in Madison on May 3rd. The HR&D Office at the UW-Madison put on a very nice conference which was very informative. Networking with other employees was encouraged during the keynote address when we were all challenged to meet three new people and learn something about each of them. Attendees came from as far as Ashland, WI to attend the conference.

Most of the attendees agreed that the **Keynote and "Managing your Emotional Intelligence" workshop speaker, Kathryn Jeffers**, a faculty member in Executive Education at UW-Madison, was extremely interesting. She has a Master's Degree in Communication, has been named one of the "top twenty-five outstanding presenters" in the United States by *Sharing Ideas* Magazine, and has authored the book **Don't Kill the Messenger**. She has trained and coached thousands of people in the art of bettering working relationships and becoming more productive in the past twenty years.

Other workshops to attend were "Understanding your Benefits" by Kara Webber Schiro, a Benefits Specialist at UW-Madison; "Your Roadmap to Retirement Planning" by Dianne Saari, Benefits Specialist at UW-Madison; "Setting Boundaries with Co-Workers" by Steve Pearson, Director Employee Assistance Office, UW-Madison; "Practical and Powerful Tips for Powerpoint" by Kevin Thompson, Technology Trainer and Consultant, UW-Madison; "Caregiving-It's a Journey" by Marie Hornes, Senior Clinical Social Worker, UW Hospitals and Clinics; "Ergonomics-Being Comfortable in your Workstation" by Michelle Discher, Occupational Health and Safety, UW-Madison; "Heart Smart Nutrition" Liz Freiticik, UW Hospital & Clinics; "Improving Climate" Don Schutt, Director HR&D UW-Madison; "Knowledge, Skills and Talents" Mary Hoddy, Staff Education Coordinator, UW-Madison and "Managing Email Madness" by Pat Seidel of Pat Seidel Consulting.

Many attendees felt they learned valuable tips in the **ergonomics** workshop and thought it would be a good topic for our meetings.

The **benefits and retirement workshops** were very informative and fairly easy to understand. One of the main points stressed..."save your sick leave!" They had a handout with a checklist for employees with items to check off 10 years and 5 years out from retirement. They suggested creating a retirement binder so everything is in one place. The benefits of "early" retirement were discussed. A meeting with the Department of Employee Trust Funds (ETF) one year from retirement is advised.

Announcement by Jodi Hare that **"+/-" grading** will be going into effect for remedial, 100 and 200 level courses Fall 2007 and all undergraduate courses will be under that policy for Fall 2008. This new grading policy was passed by the Faculty Senate and being implemented by the Registrar's office per their instructions.

Summer grading windows are open the Wednesday prior to the end of each session until the Wednesday after. This procedure provides security for the grading process. Grades can only be entered while the windows are open.

Repeat rules are run the end of Summer. This may affect students who have taken and received a passing grade and are wondering why their repeat status on their a/r has not changed. It will not change until the office runs the rules on WINS...

Update on Office Moves-UC. All UC offices that were moving this Summer, have moved. Printing Services is now in the lower level of Moraine Hall (Bookstore). The Credit Union has moved to Drumlin. There are ATM machines in Drumlin, Wells and the Center of the Arts.

Mike Hirschfield, Director of Procurement Services was today's guest speaker. His topic was the proper use and upcoming audits of departmental procurement cards.

History of the procurement card at UW-W. The first cards were issued in 1995 with a \$500 limit, in 1998 the limit was raised to \$1500 and in 1999 to \$5000. The Summer of 2000 blanket orders were eliminated. At first there were many restrictions to the cards and now they are much less restricted. They are becoming more restricted again. **We are required to buy from mandatory contracts, our purchases are monitored by: US Bank, Sun Bank, UW-Whitewater, the Department of Administration and campus departments.** On-line access allows electronic auditing monthly.

Items not audited by the above:

1. Contract purchases – buy from peripheral contract vendors listed on Gateway to UW-Madison, UW Systems and DOA Contracts website:
<http://www.bussvc.wisc.edu/purch/contract/conindx.html>. Type in item and search-Vendors for each item will show up). Furniture vendor-BSI (Badger State Industries) should be checked first, if items are not available from them, they may be ordered from one of the 48 other furniture vendors listed. **TIP:** Badger will repair furniture if it is broken...for FREE if it is purchased from them. Computer related items: Contact Greg Roehl.

2. Travel purchases – Financial Services audits all travel card purchases

Purchases are audited for:

Non tax compliance (non tax exempt purchases)
 Serial purchasing over \$5000 (putting a large ticket item through as several smaller transactions)
 Non compliance
 High risk
 Compliance recordkeeping
 Security of card

Not allowed

1. Meals are no longer allowed on procurement cards or travel cards. **Chartwells** “refreshments” are allowed as they are a contract vendor. A food expense checklist must be submitted with any “refreshment” purchases through Chartwells. Sign in sheet at entrance to meeting is the best way to document attendees.

2. **Some items may be allowed or not allowed based on who/where they are used.** Items such as coffee, water dispensers and tissues may be purchased if they are in public areas and are for public consumption.

Key information for audits:

The following items should be kept secure and together: credit cards, designated user agreements signed by cardholder and user for all users of the departmental purchasing card (procurement card, pro-card).

Items should be kept together:

Pro-card Log – signed by cardholder and supervisor

Credit Card Statements

WISDOM expense documentation (journal entries)

Receipts

Food expense checklist

Travel expense reports

September 2005 – January 2006 are the dates currently being audited. Audits are currently in progress. You may be called day of or day before your department/program/card is to be audited.

BE PREPARED!

Meeting closed at 10 a.m. It was attended by 39 employees.