FHR Council Meeting

Wednesday, April 22, 2021

Via Zoom

10 a.m.

California State University

C H A N N E L
I S L A N D S

WELCOME

Laurie Nichols
Interim Assistant Vice President for Administrative Services

Stephanie Bracamontes
Interim Assistant Vice President for Financial Services/Controller

Agenda

I. Welcome

II. New Employees

III. Active Recruitment

IV. Year-End Deadlines

V. Finance 101 Training

VI. CHRS

VII. Questions

New Employees

New Employees

Wendi Nightingale, Student Business Services

Any questions related to FA disbursements, refunds, third party sponsorship, & fee waivers

Patricia Sainz, Fiscal Services (starting May 3)

Any questions related Campus' accounts payable functions and other general accounting related tasks.

Jessica Parker, Human Resources

Any questions related to Human Resources inquiries, new hire sign-in, separation process, student assistant employment, document intake, and first point of contact (general questions).

Active Recruitment

Active Recruitment

Contract Manager, Procurement & Contract Services

Responsible for the review and approval of all contract activities for the University and Auxiliaries, oversight of RFP contracts from initiation through completion and acts as an agent of the University for campus clients and third-party vendors during the contract negotiation process for the purposes of mitigating liabilities.

Year-End Deadlines

Year-End Deadlines
PROCUREMENT

Requisition Type	Dates to Submit	Requisition Information
New Requisitions	April 1 – May 26, 2021	Requisition Required Documents: • Expense Approval Form Required for purchases over $5,000 • Quote or Completion of Bid • Scope of Work and Contracts • Computers, Printers /Software Require TeamDynamix Ticket # - Any items connected to CI's network will require a TD ticket #
Requisitions over 50K or require a Contract/Bid	Fri, April 30, 2021	
Receiving on Site *	No later than June 15, 2021	
Change Orders - Require a Requisition (No Exceptions)	April 1 – June 11, 2021	

Year-End Deadlines
FISCAL SERVICES

Please stand-by while a separate document is shared…

Finance 101 Training

Finance 101 Training

California State University
CHANNEL ISLANDS

RETs/JETs and Data Warehouse Review

Accruals and Prepaids

AP Invoices - FAQs

Departmental Deposits

Requisition to Purchase Order

Purchasing IT Equipment and Software

Finance 101 Trainings - April 27, 2021

Zoom Link	Title of Training	Time
https://csuci.zoom.us/j/85042967682	RETs/JETs and Data Warehouse Review	9:00a.m. - 10:00 a.m.

Description: Going over the RETs/JETs form - what is required for submitting a RETs/JETs to ensure they are posted timely. Da

Who should attend: This training session is for those who submit RETs and JETs and anyone who is creating reports in the Da you need help in creating.

Zoom Link	Title of Training	Time
https://csuci.zoom.us/j/84425231988	AP invoices - FAQs	10:15a.m. - 11:00 a.m.

Description: Want to ensure your invoice will be processed timely? Learn the tips and tricks of what is needed when submittin

Who should attend: This training session is for those who submit invoices to Accounts Payable for payment.

Zoom Link	Title of Training	Time
https://csuci.zoom.us/j/81426464777	Accruals and Prepaids	11:30a.m. -12:00p.m.

Description: Learn about submitting accruals for the yearend and learn about Prepaids.

Who should attend: This training is for those who are submitting accruals for yearend and those creating POs with items cros

Zoom Link	Title of Training	Time
https://csuci.zoom.us/j/88931119874	Departmental Deposits	1:00p.m. - 1:30p.m.

Description: The Fundamentals for processing your Departmental Deposit

Who should attend: Anyone with the responsibility for processing departmental deposits

Zoom Link	Title of Training	Time
https://csuci.zoom.us/j/89392165313	Ins and Outs of Purchasing IT Equipment and software	2:00p.m. - 2:30p.m.

Description: Information Technology Purchases - This training will serve as a refresher for "existing" users and provide the opp

Who should attend: Individuals who pruchase IT equipment and software.

Zoom Link	Title of Training	Time
https://csuci.zoom.us/j/84381018906	Requisition to Purchase Order	3:00p.m. - 3:30pm

Description: Requisitions - This training will serve as a refresher for New & Existing users:
- What information is required on a requisition
- What documents to attach

Who should attend: All Requestors ordering Goods or Services through PeopleSoft.

Overview only

CHRS Recruiting Project Update

Recruiting
Built in PageUp

Presented by

Laurie Nichols, CHRS Recruiting Project Co-Sponsor

Christine Girardot, CHRS Recruiting Communications Lead

What will CHRS Recruiting do for me?

As a hiring manager, search committee member, or recruitment support individual, this new system will enhance:

Recruitment

Handles all categories of recruiting: all types of faculty, administrators, staff and student workers in a secure environment

Matches each university's branding for a seamless user experience for applicants

Onboarding

Offers a paperless way to perform most functions within recruiting, from posting a job to onboarding new employees

Automates workflow and integrates with the main PeopleSoft human resources system to streamline functions and increase recruitment efficiencies

Analytics

Allows each CSU university to configure many of their processes – on top of the system foundation common to all campuses

Provides valuable analytics to help campuses make informed decisions

When is this happening?

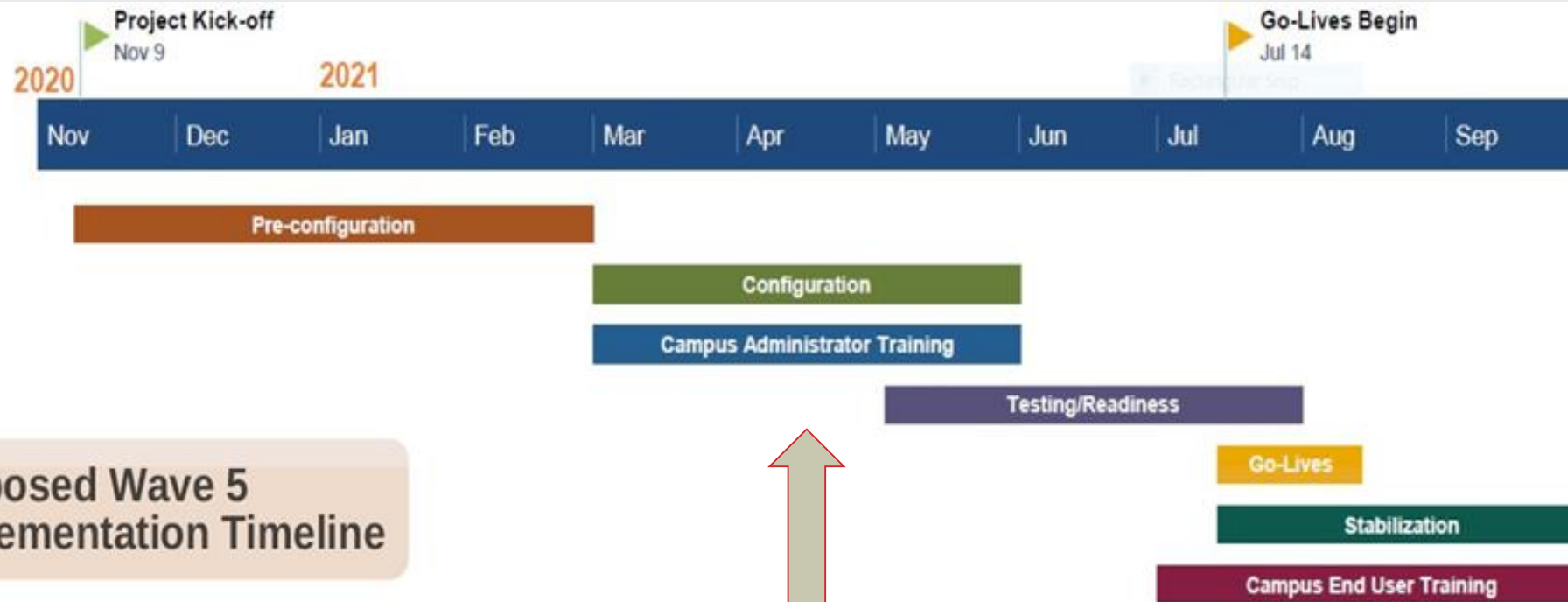## July 2021 - Go Live Date

Wave 5 campuses: Channel Islands, Humboldt, Monterey Bay, Sacramento, San Marcos

Meet the Project Team

| Reinforcing Sponsors	Project Managers & Campus Configuration	Subject Matter Experts	Information Technology Support
Jim August, DBFA - Information Technology Services (ITS)	Donna Flores (FA)	Christine Girardot (HR)	Angela Stockmon
Laurie Nichols, DBFA - Human Resources (HR)	Jerilee Petralba (FA)	Shalaine Nolan (FA)	Carlos Miranda
Sheila Grant, DAA - Faculty Affairs (FA)	JoAnn Stuermer (HR)	Wendy Olson (HR)	Daniel Martinez
	Martha Ferguson (HR)	Other Divisional Stakeholders	Neal Fisch
	Stephany Rodriguez (HR)		Pedro Rivas
	Bess Walden (CO)		Ryan Garcia
	Jeff Morris (Consultant)		

Ways You Can Support CHRS Recruiting

Participate in campus training and go live events

Provide feedback either directly or through survey responses
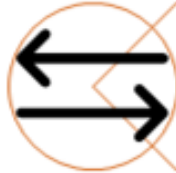
Recognize and acknowledge the complexity of change

Celebrate and advocate for change (even small ones)

Contact CHRS Recruiting Project Implementation Team
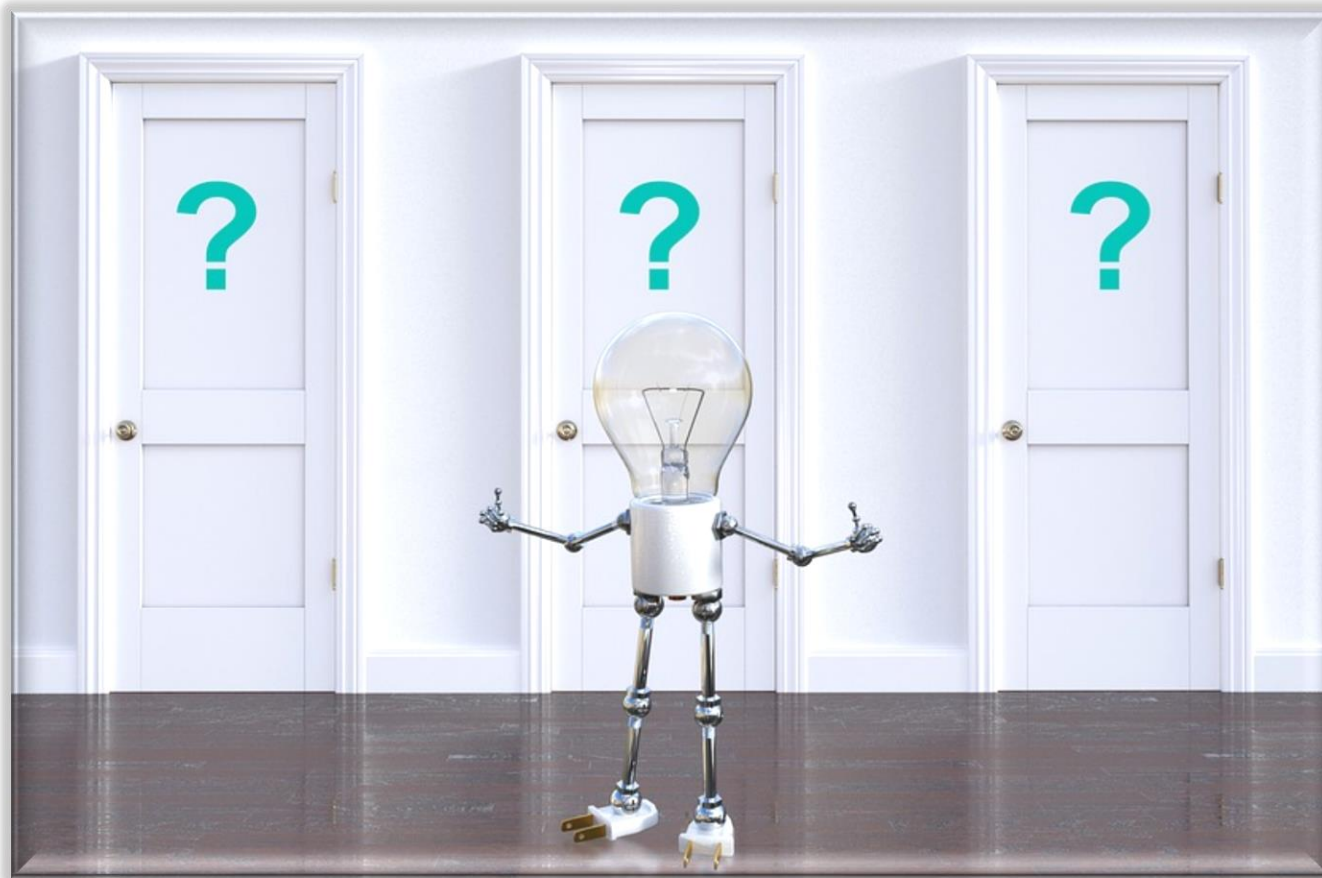- ITS Project Management
- Change Management

Visit https://www.csuci.edu/hr/chrs-recruiting.htm

Thank You

FHR Council website: https://www.csuci.edu/financial-services/fhr-council.htm